



Broadcasting
Board of
Governors

2010

Annual Language Service Review Briefing Book



International
Broadcasting
Bureau



Voice of America®



RadioFreeEurope
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Radio Free Asia



MIDDLE EAST BROADCASTING NETWORKS, INC.



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Preface

This is the briefing book for 2010 in support of the BBG's congressionally mandated, annual review of all broadcast language services – the process known as Language Service Review.

The book provides BBG governors and senior managers – and this year, all employees as well – with quick access to core performance and other data for all language services as well as relevant data and information regarding the media and political environments in which the services operate. While such information is already available across the agency through routine research reports, there is added value in a ready reference document.

This marks the eighth year that the BBG has produced some version of this book. For this edition, there has been a complete revision of previous formats. A new two-page layout replaces the previous one-page design, and many data points expressed as numbers before are now represented in graphs and charts. All this aims at making the book simpler and easier to use.

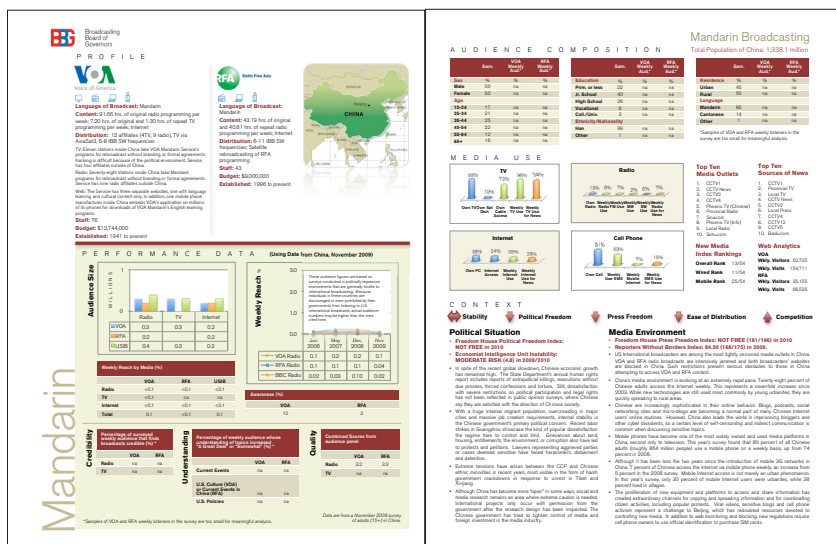
In addition, this year the book expands the data points it presents by including relevant factors such as leading media outlets and principal sources of news in the various BBG target markets.

It bears noting that the BBG does not attempt to evaluate the performance of the language services based only on a few indicators, regardless of their relevance. The BBG research program yields a host of other data that are fully factored into both program reviews at the broadcast entities and the Language Service Review conducted by the Board.



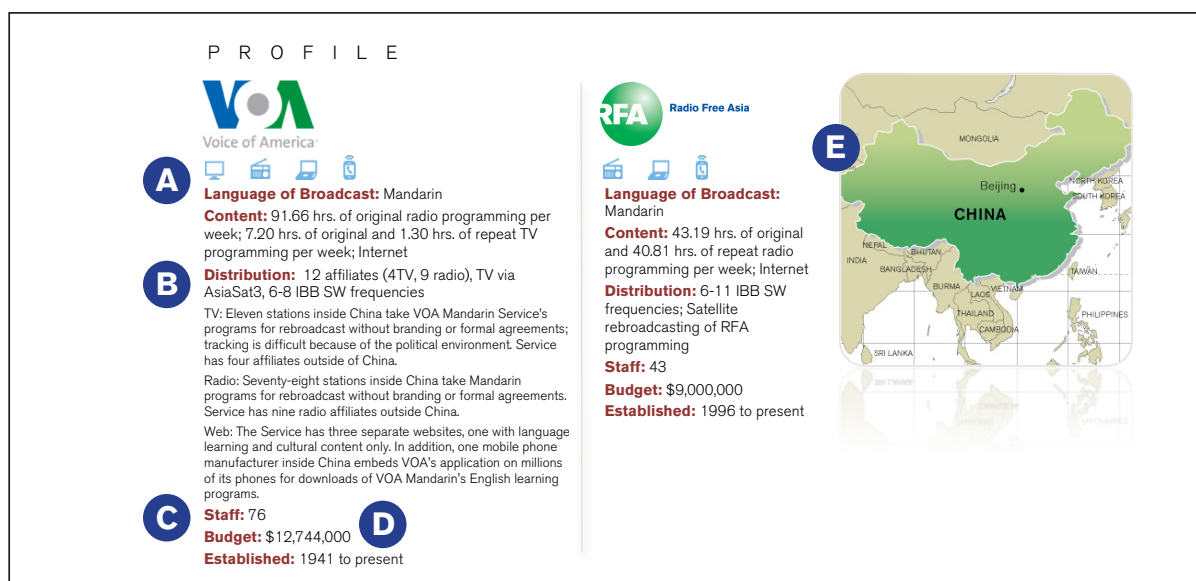
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The Language Service Review Briefing Book is designed to give an overview of the broadcasting environment, programming, and performance of each language in which the BBG broadcasts during the fiscal year under review. This section will explain what is measured and reported in each section and how to interpret the graphic indicators.



Profile Section

- A Media Icons**
identify the platforms for which the relevant language service produces content.



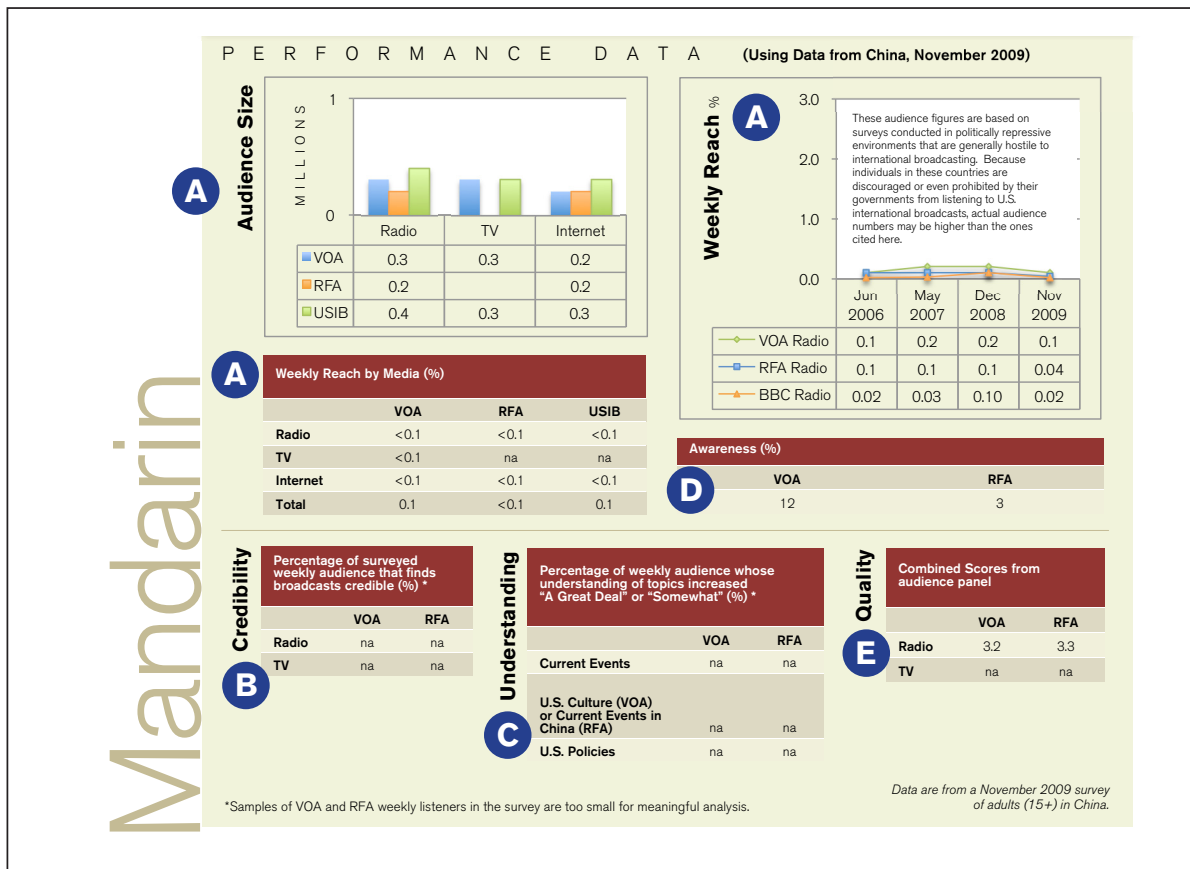
- B Affiliates**
summarize broadcast partners, although those itemized in the distribution section do not include the many small or transitory stations defined as 'low impact' by the Office of Marketing and Placement.

- C Staff**
figures are FY2010, not actual, unless otherwise noted.

- D Budget**
figures include FY2010 amortized transmission costs, including affiliate leases, for each language service.

- E Map**
generally display services' target countries for broadcast and/or the source of national market and performance data found in subsequent tables and charts.

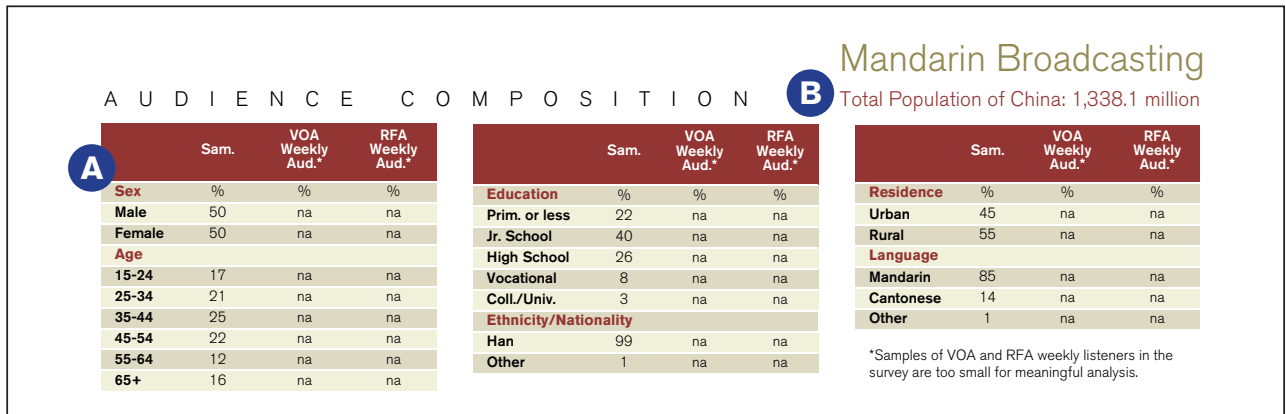
Performance Data Section



- Data in this section reflect the agency's core performance measures of **Weekly Reach A** (in numbers as well as a percentage of the adult population), **Credibility B** of programming and **Understanding C** of current events and other mission-related topics (both as percentage of weekly audience), by language service. USIB indicates total unduplicated figures for U.S. International Broadcasters where there is language overlap.
- When available, multi-year shifts in reach of U.S. Broadcasters and key competitors is shown in the trend graph in the upper right. Unless otherwise noted in the table below the trend graph, broadcaster weekly reach includes all media platforms. In 2011, internet and mobile reach will have been measured long enough for all services to be able to report a multi-year trend.
- Also shown are two other important indicators: **Awareness D** and **Quality E**. Awareness figures reflect the percentage of the population that has heard of the broadcaster, either prompted or unprompted. Quality scores reflect the weighted combined score of internal and external evaluation panels who rate programming for both content and production quality on a scale of 1 (poor) to 4 (excellent).
- Data in this section come from the most recent survey in 1 or 2 target countries of the service. Some language services, by definition, target only one country. Others target multiple countries, though not every such service gets a survey in each country every year. In the case of Arabic, however, the BBG conducts annual surveys in up to 8 countries. Two surveys are featured on the Arabic page as examples from a high impact and a low impact market: Iraq and Lebanon respectively, while data from other countries surveyed can be found in an addendum spreadsheet.

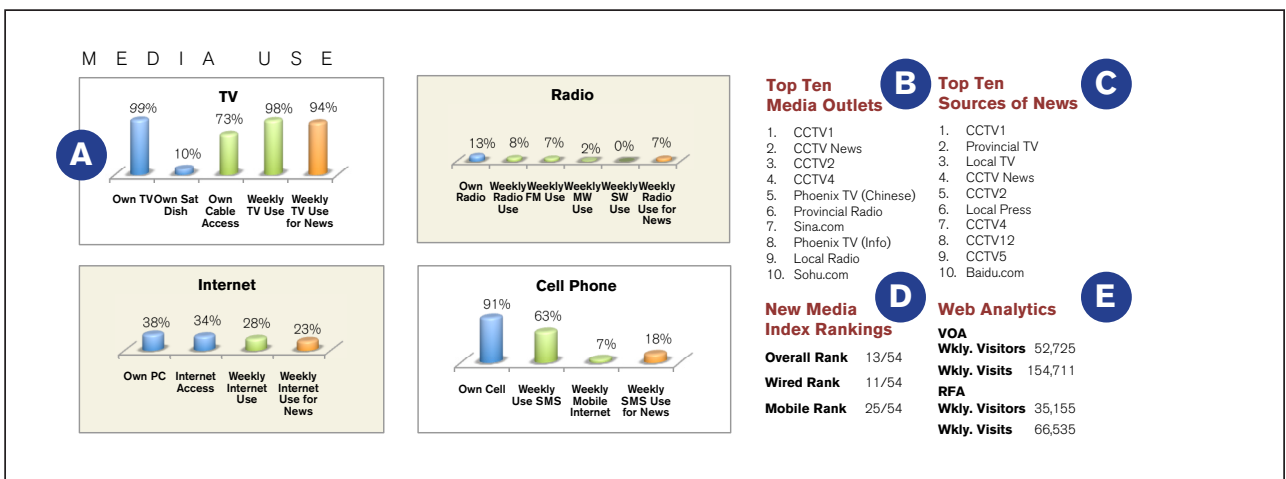


Audience Composition Section



- A** • Tables in this section describe what we know of the adult population 15 years and older (in the 'Sample' column), side by side with what we know about our respective broadcaster audiences. The standard demographic indicators: sex, age, education, ethnicity, residence and language are also displayed. 'Language' indicates the language spoken most at home.
- B** • The **Total Population** of each target country, found in the upper right, is based on validated data from the Population Reference Bureau. This reflects the total population, including those less than 15 years old.

Media Use Section



- A** • In the TV, Radio, Internet and Cell Phone bar charts, blue bars indicate ownership, or more specifically, 'access in the household'. Green bars indicate use of a particular medium at least once per week, and orange bars indicate at least weekly use of that medium for news, regardless of ownership.
- B** • **Top Ten Media Outlets** lists the local media outlets that have the greatest daily reach, from highest to lowest, regardless of their news content. Daily reach reflects the percentage of the adult population that tuned into that station the 'yesterday' at the time of the survey. 'Yesterday' listening or viewing is a common proxy for 'daily' listening or viewing in audience research.

- C** • **Top Ten Sources of News** reflects the most frequently cited sources of news, regardless of platform, from highest to lowest. While different from reach, this measure is a very important indicator of impact for our broadcasters. If a page highlights two target countries, top sources of news for both are typically displayed, although are omitted for target countries where researchers cannot ask this question.
- D** • **New Media Index Rankings** reflect the relative ability of target countries to consume our broadcasters' content via new media. Fifty-four countries are ranked into quintiles, based primarily on data describing internet (wired) and mobile use gathered in BBG national surveys. A lower number indicates a higher rank, and a greater ability to consume new media content. In some markets, there are notable differences between a country's wired and mobile rankings.
- E** • Google Analytics is the source of the **Web Analytics** data for VOA, RFE/RL and RFE. MBN uses Urchin, a subsidiary of Google. 'Weekly Visitor' describes the number of unique weekly visitors to a broadcaster's website. 'Weekly Visits' describes the number of total visits to that site in one week. Visits and visitors from USIB IP addresses (agency computers) are filtered out of these figures.

Context Section

C O N T E X T

A **Stability**

Political Freedom

Press Freedom

Ease of Distribution

Competition

Political Situation

- **Freedom House Political Freedom Index: NOT FREE in 2010**
- **Economist Intelligence Unit Instability: MODERATE RISK (4.8) in 2009/2010**
- In spite of the recent global slowdown, Chinese economic growth has remained high. The State Department's annual human rights report includes reports of extrajudicial killings, executions without due process, forced confessions and torture. Still, dissatisfaction with severe restrictions on political participation and legal rights has not been reflected in public opinion surveys, where Chinese say they are satisfied with the direction of Chinese society.
- With a huge internal migrant population, overcrowding in major cities and massive job creation requirements, internal stability is the Chinese government's primary political concern. Recent labor strikes in Guangzhou showcase the kind of popular dissatisfaction the regime tries to control and limit. Grievances about land, housing, entitlements, the environment, or corruption also have led to protests and petitions. Lawyers representing aggrieved parties or cases deemed sensitive have faced harassment, disbarment and detention.
- Extreme tensions have arisen between the CCP and Chinese ethnic minorities in recent years, most visible in the form of harsh government crackdowns in response to unrest in Tibet and Xinjiang.
- Although China has become more "open" in some ways, social and media research remains an area where extreme caution is needed. International projects only occur with permission from the government after the research design has been inspected. The Chinese government has tried to tighten control of media and foreign investment in the media industry.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (181/196) in 2010**
- **Reporters Without Borders Index: 84.50 (168/175) in 2009.**
- US International broadcasters are among the most tightly censored media outlets in China. VOA and RFA radio broadcasts are intensively jammed and both broadcasters' websites are blocked in China. Such restrictions present serious obstacles to those in China attempting to access VOA and RFA content.
- China's media environment is evolving at an extremely rapid pace. Twenty-eight percent of Chinese adults access the Internet weekly. This represents a sevenfold increase since 2003. While new technologies are still used most commonly by young urbanites, they are quickly spreading to rural areas.
- Chinese are increasingly sophisticated in their online behavior. Blogs, podcasts, social networking sites and micro-blogs are becoming a normal part of many Chinese Internet users' online routines. However, China also leads the world in imprisoning bloggers and other cyber dissidents, so a certain level of self-censorship and indirect communication is common when discussing sensitive topics.
- Mobile phones have become one of the most widely owned and used media platforms in China, second only to television. This year's survey found that 80 percent of all Chinese adults (roughly 864 million people) use a mobile phone on a weekly basis, up from 74 percent in 2008.
- Although it has been less the two years since the introduction of mobile 3G networks in China, 7 percent of Chinese access the internet via mobile phone weekly, an increase from 5 percent in the 2008 survey. Mobile Internet access is not merely an urban phenomenon. In this year's survey, only 30 percent of mobile Internet users were urbanites, while 38 percent lived in villages.
- The proliferation of new equipment and platforms to access and share information has created extraordinary channels for copying and spreading information and for coordinating citizen activities, including popular protests. Viral videos, sensitive blogs and cell phone activism represent a challenge to Beijing, which has redoubled resources devoted to controlling new media. In addition to web monitoring and blocking, new regulations require cell phone owners to use official identification to purchase SIM cards.

- A** • Red arrows quickly describe the state of five key elements in the target country or region. Down arrows imply a poor or declining state, up arrows a good or increasing state, and sideways arrows a middling or static state.
- The states of **Stability**, **Political** and **Press Freedom** are based on both respected external indices (such as Freedom House and the Economist Intelligence Unit) and the judgment of analysts familiar with BBG audience research from that market. States of **Ease of Distribution** and **Competition** are based on audience data and the experience of the service. Rarely is any market experiencing a decrease in media competition, even those under heavy state control.



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Language Service Profiles A-Z

PROFILE



Language of Broadcast: Albanian

Content: 10.5 hrs. of original radio and 3.5 hrs. of original TV programming per week – an additional 0.25 hrs. of TV broadcasting to Albania per week; Internet

Distribution: 21 affiliates (9 TV, 12 radio), 1 IBB FM and 1 IBB SW frequency

Radio: The service's radio programs are carried by 8 affiliates in both Albanian and Macedonia and by an IBB FM in Pristina, as well as an IBB SW frequency.

TV: VOA Albanian broadcasts are carried by 18 TV affiliates in Albania and 11 TV affiliates in Macedonia.

Web: The Service has an Internet site, and content is available on Twitter, Facebook and You Tube. It also sends out a daily newsletter to more than 5,000 subscribers.

Staff: 12

Budget: \$1,753,000

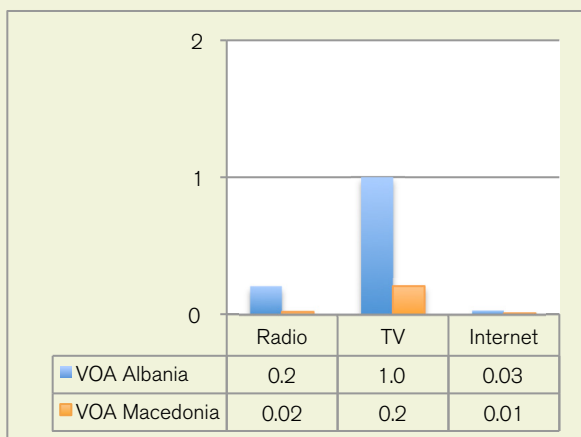
Established: 1943 to 1945; 1951 to present; TV service established in 1999



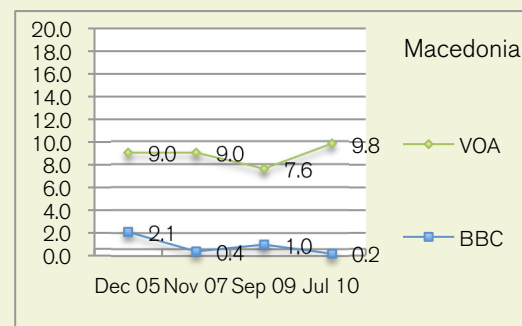
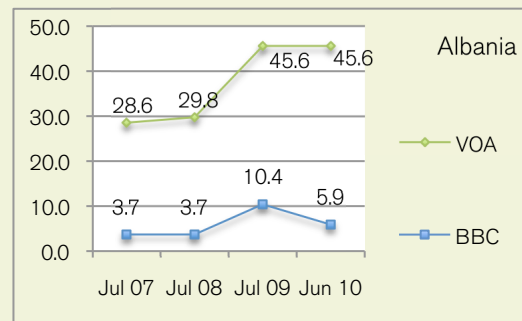
PERFORMANCE DATA

(Using Data from Albania, June 2009 & Macedonia, July 2010)

Audience Size



Weekly Reach %



Weekly Reach by Media (%)		
	Albania	Macedonia
Radio	6.4	1.1
TV	43.3	9.3
Internet	1.3	0.4
Total	45.6	9.8

Awareness (%)		
	Albania	Macedonia
	54	73

Credibility

Percentage of surveyed weekly audience that found broadcasts credible (%)		
	Albania	Macedonia
Radio	99	94
TV	99	95

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)		
	VOA Radio* Albania	VOA Radio** Macedonia
Current Events	88	96
U.S. Culture	86	71
U.S. Policies	82	67

Quality

Combined Scores from audience panel	
	VOA
Radio	3.6
TV	3.5

*Understanding ratings for VOA TV in Albania are 93% for Current Events, 76% for U.S. Culture and 79% for U.S. Policies.

** Understanding ratings for VOA TV in Macedonia are 97% for Current Events, 77% for U.S. Culture and 73% for U.S. Policies.

Data are from an June, 2010 survey of adults (15+) in Albania and a July, 2010 survey of adults (15+) in Macedonia..

Albanian Broadcasting

A U D I E N C E C O M P O S I T I O N

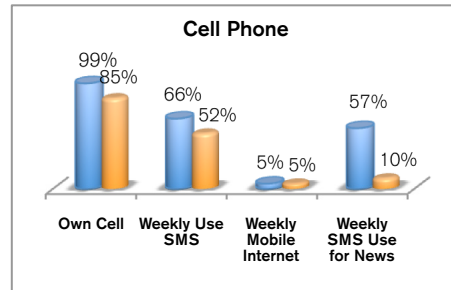
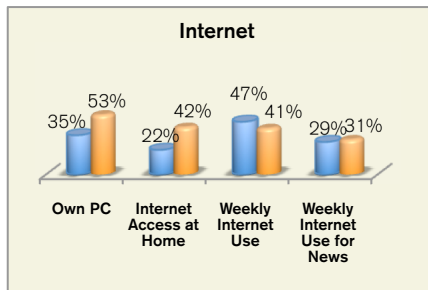
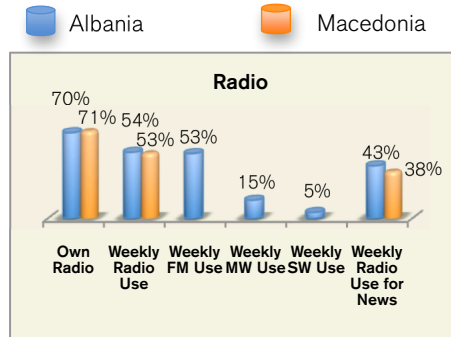
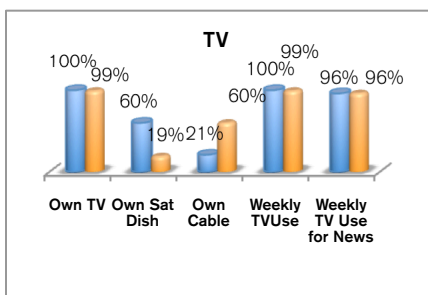
Total Population of Target Country: Albania 3.2 M and Macedonia 2.1 M

	Alb. Sam.	Alb. Wkly. Aud.	Mac. Sam.	Mac. Wkly. Aud.
Sex	%	%	%	%
Male	49	52	50	55
Female	51	48	50	45
Age				
15-24	24	14	20	22
25-34	20	19	19	23
35-44	17	19	19	26
45-54	15	18	15	14
55-64	15	18	15	12
65+	9	11	12	4

	Alb. Sam.	Alb. Wkly. Aud.	Mac. Sam.	Mac. Wkly. Aud.
Educ	%	%	%	%
None	<1	0	2	1
Elem/Sec	37	27	35	49
Upper Sec	46	51	48	35
Higher	18	22	15	16
Ethnicity/Nationality				
Albanian	98	98	23	98
Maced.	na	na	67	1
Other	2	2	10	1

	Alb. Sam.	Alb. Wkly. Aud.	Mac. Sam.	Mac. Wkly. Aud.
Residence	%	%	%	%
Urban	48	54	57	31
Rural	52	46	43	69
Language Spoken at Home				
Albanian	98	98	23	98
Macedonian	na	na	72	1
Other	2	2	5	1

M E D I A U S E



Albania Top Ten Sources of News

1. Top Channel
2. News 24
3. Vizion Plus
4. TV Klan
5. TVSH
6. www.google.com
7. Panorama
8. Top Albania
9. Shekulli
10. Shqip

Macedonia Top Ten Sources of News

1. A1
2. Sitel
3. Kanal 5
4. Alsat
5. Macedonian TV1
6. Dnevnik
7. Vreme
8. Vest
9. www.google.com
10. Telma

New Media Index Rankings

Albania	
Overall Rank	26/54
Wired Rank	24/54
Mobile Rank	28/54

Web Analytics

Weekly Visitors	10,064
Weekly Visits	31,723

Macedonia

Overall Rank	5/54
Wired Rank	1/54
Mobile Rank	15/54

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index:** Albania—PARTLY FREE; Macedonia—PARTLY FREE in 2009
- **Economist Intelligence Unit Instability:** Albania—HIGH RISK (6.2); Macedonia—HIGH RISK (6.6)
- Albania has been almost paralyzed for a year now by political wrangling following disputed elections in June 2009. One of the two major political forces – the Socialist Party - boycotted parliament and held rallies over allegations of wide-spread fraud by the rival Democratic Party.
- The political stalemate is likely to hurt Albania's chances for European Union candidacy status, the first step towards an eventual membership, as well as expectations for visa-free travel within the Schengen area.
- Animositities between the two major political players are hindering long-awaited economic and social reforms. The country's economy is in dire straits and remittances from emigrants, a large number of whom work in debt-ridden Italy and Greece, have been shrinking. Endemic corruption and unemployment remain major issues of concern among the public.

Media Environment

- **Freedom House Press Freedom Index:** Albania—PARTLY FREE (102/196); Macedonia—PARTLY FREE (94/196) in 2010
- **Reporters Without Borders Index:** Albania—25.00 (96/175); Macedonia—8.75 (62/175) in 2009
- RTSH, the state broadcaster, is still a long way from becoming a true public service. Government interference and commercial pressures are preventing the broadcaster from fulfilling its mission of informing the public.
- The multitude of information sources has failed to generate genuinely diverse opinions. The majority of outlets are affiliated with political parties and/or business interests which severely limits their editorial independence. Ownership has remained non-transparent.
- Only a handful of leading broadcasters have introduced varied programming, including public affairs shows, and have taken steps to modernize their equipment. The rest of the media survive on hand-outs from their owners. Owners, in turn, use media outlets to advance their political or business agenda.
- In terms of content, the general trend is towards more entertainment and light topics rather than current affairs, social or economic coverage.



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PROFILE



Voice of America®



Language of Broadcast: Albanian to Kosovo

Content: 10.5 hrs. of original radio and 3.5 hrs. of original TV programming per week; Internet

Distribution: 21 affiliates (9TV, 12 radio), 1 IBB FM and 1 IBB SW frequency

Radio: The service's radio programs are carried by 12 FM affiliates and by an IBB FM in Pristina, as well as an IBB SW frequency.

TV: VOA Albanian broadcasts are carried by the third largest national station in Kosovo, TV21, and by 8 other affiliate stations.

Web: The Service has an Internet site, and content is available on Twitter, Facebook and YouTube. It also sends out a daily newsletter to more than 5,000 subscribers.

Staff: 12

Budget: \$1,753,000

Established: 1943 to 1945; 1951 to present; TV service established in 1999



RadioFreeEurope
RadioLiberty



Language of Broadcast:

Albanian to Kosovo

Content: 10.5 hrs. of original radio programming per week; Internet

Distribution: RFE/RL's delivery comprises 37 FM stations including IBB FM transmitter in Pristina plus HotBird and Internet with streaming audio.

Staff: 17†

Budget: \$4,410,000†

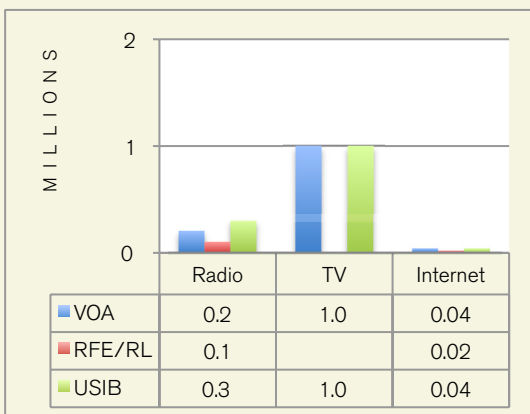
Established: 1999 to present

† Numbers reflect RFE/RL Balkan service totals which include Albanian, Bosnian, Macedonian, Montenegrin and Serbian.



PERFORMANCE DATA (Using Data from Kosovo, July 2009)

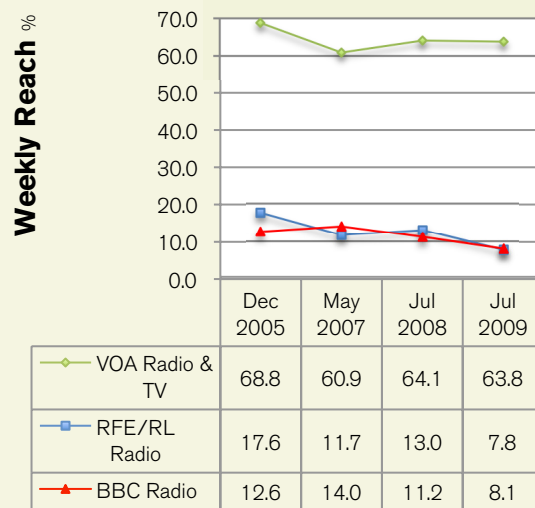
Audience Size



Weekly Reach by Media (%)

	VOA	RFE/RL	USIB
Radio	14.4	7.3	16.1
TV	62.1	na	62.1
Internet	2.6	1.1	2.8
Total	63.8	7.8	64.1

Weekly Reach



Awareness (%)

VOA	RFE/RL
76	76

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

	VOA	RFE/RL
Radio	98	97
TV	99	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

	VOA TV*	RFE/RL
Current Events	95	98
U.S. Culture (VOA)/Current Events in Kosovo (RFE/RL)	78	97
U.S. Policies	76	na

*Understanding ratings for VOA radio are 96% for Current Events, 79% for U.S. Culture and 78% for U.S. Policies.

Quality

Combined Scores from audience panel

	VOA	RFE/RL
Radio	3.6	3.1
TV	3.5	na

Data are from a July 2009 nationwide survey of adults (15+) in Kosovo.

Albanian to Kosovo Broadcasting

A U D I E N C E C O M P O S I T I O N

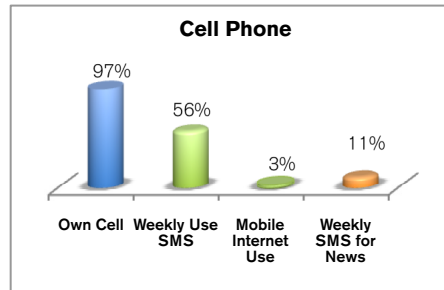
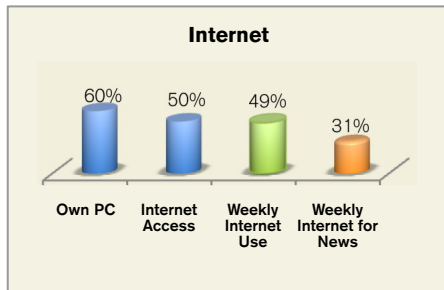
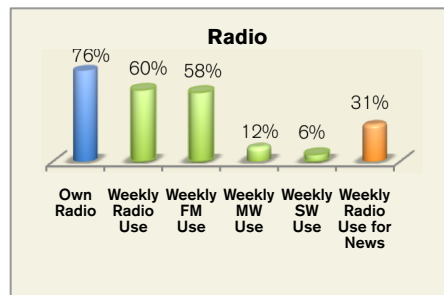
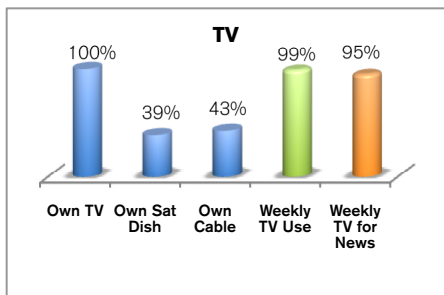
Total Population of Kosovo: 2.3 million

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
Sex	%	%	%
Male	49	53	75
Female	51	47	25
Age			
15-24	30	25	16
25-34	23	23	21
35-44	17	18	21
45-54	13	15	19
55-64	10	11	15
65+	7	7	8

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
Education	%	%	%
None	3	2	0
Primary	44	41	29
Secondary	41	42	55
Coll./Univ.	12	15	15
Ethnicity/Nationality			
Albanian	92	97	98
Serbian	5	1	0
Other	3	2	2

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
Residence	%	%	%
Urban	46	48	48
Rural	54	58	52
Language			
Albanian	93	98	99
Serbian	6	1	0
Other	1	1	1

M E D I A U S E



Top Ten Media Outlets

1. RTK
2. KTV Koha Vision
3. RTV 21
4. VOA Albanian TV
5. Top Channel
6. Alsat
7. TV Klan
8. TVSH
9. Digitalb
10. Radio Dukagjini, Peje

Top Ten Sources of News

1. RTK
2. RTV 21
3. Koha Vision
4. Koha Ditore
5. Kosova Sot
6. Radio Dukagjini
7. RTS – Srbija
8. Top Channel
9. VOA Albanian
10. Bota Sot

New Media Index Rankings

Overall Rank	3/54
Wired Rank	3/54
Mobile Rank	3/54

Web Analytics

VOA Weekly Visitors	10,064
Weekly Visits	31,723
RFE/RL Weekly Visitors	9,615
Weekly Visits	32,216

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: NA**
- **Economist Intelligence Unit Instability: NA**
- Kosovo, which declared its independence from Serbia in 2008, has not received full international recognition, although in September 2010, Serbia compromised with a UN resolution that calls for cooperation with Kosovo, rather than an earlier demand for a review of its status.
- Kosovo's political establishment has recently been shaken by a growing investigation initiated by the EU's Rule of Law mission in Kosovo, EULEX. Top Kosovo officials are being questioned over their alleged involvement in bribery and money laundering.
- In the meantime, Prime Minister Hashim Thaci has launched an anti-corruption campaign. Some fear, however, that it may turn into a witch-hunt of political opponents.
- Tensions between ethnic Serbs and Albanians flared again in July when two Serbs were killed in separate incidents in the divided town of Mitrovica, triggering mutual incriminations from Serbia and Kosovo. EULEX has taken over the investigations of the incidents from the Kosovo police.

Media Environment

- **Freedom House Press Freedom Index: Partly Free (53/196) in 2010**
- **Reporters Without Borders Index: 16.58 (75/175) in 2009**
- Access to media sources in Kosovo has been expanding quickly with the speedy growth of the Internet and cable networks. The ongoing digitalization of electronic media is expected to be completed by 2015.
- The growth in media sources, however, has not been accompanied by an improvement in professional standards. Journalists often do not verify their information and can succumb to self-censorship out of fear or due to pressure from their employer.
- The public broadcaster, Radio Television of Kosovo, is deemed by observers to be under the control of the government, often promoting its activities rather than critically assessing them. Private media generally follow editorial policies enforced by their owners.



PROFILE

MIDDLE EAST
BROADCASTING
NETWORKS, INC. **MBN**



Language of Broadcast: Arabic

Content: Radio Sawa: 24/7 original programming; Alhurra TV: 94 hrs. of original and 74 hrs. of repeat TV programming per week; Internet

Distribution: 40 affiliates (38 FM, 2 TV), 4 IBB MW and 40 FM frequencies

Staff: 1,123

Budget: \$127,204,000†

Established: Radio Sawa; 2002 to present; Alhurra TV 2004 to present

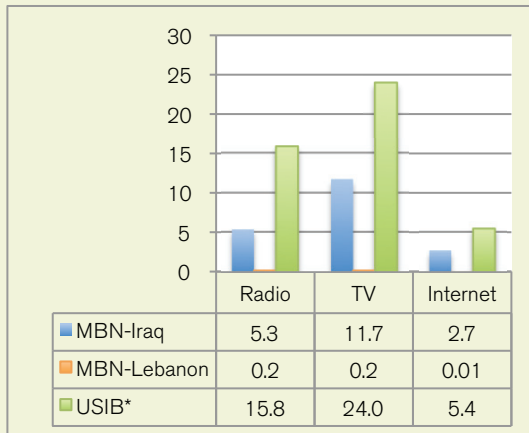
† includes additional indirect costs



PERFORMANCE DATA

(Using Data from Iraq & Lebanon, February 2010)

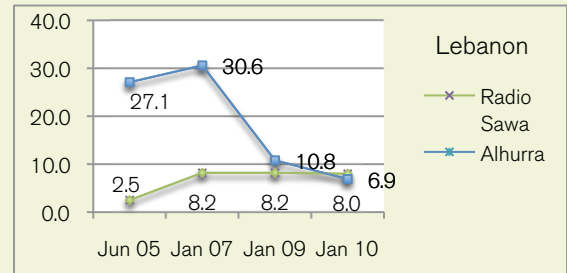
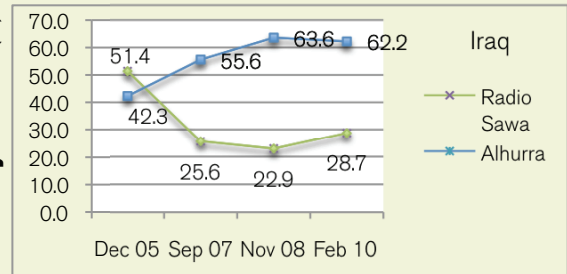
Audience Size



Weekly Reach by Media (%)

	MBN-Iraq	MBN-Lebanon
Radio	28.7	8.0
TV	62.2	6.9
Internet	20.5	0.3
Total	72.2	13.5

Weekly Reach (%)



Awareness (%)

	Sawa Iraq	Alhurra Iraq	Sawa Lebanon	Alhurra Lebanon
	71	82	34	63

Credibility

	MBN Iraq	MBN Leb.
Radio	74	80
TV	60	74

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

	Sawa Iraq	Alhurra Iraq	Sawa Leb.	Alhurra Leb.
Current Events	95	76	35	52
U.S. Culture	95	35	27	45
U.S. Policies	31	50	23	43

Quality

Combined Scores from audience panel

	MBN Iraq	MBN Leb.
Radio		
TV		

*USIB audience estimate is based on data from Algeria, Bahrain, Egypt, Iraq, Jordan, Kuwait, Lebanon, Qatar, Morocco, Oman, the Palestinian Territories, Saudi Arabia, Syria, Tunisia and the UAE. The USIB estimate for Iraq includes the impact of Radio Free Iraq (RFI) broadcasts. RFI weekly reach is 11.5%, or 2.1 million listeners in Iraq.

Data are from a February 2010 survey of adults (15+) in Iraq and a February, 2010 survey of adults (15+) in Lebanon.

Arabic Broadcasting

A U D I E N C E C O M P O S I T I O N

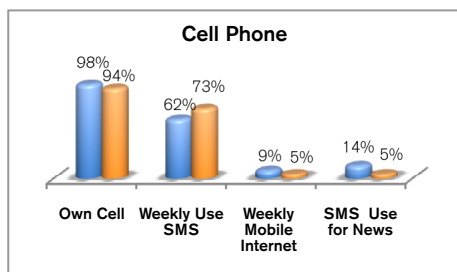
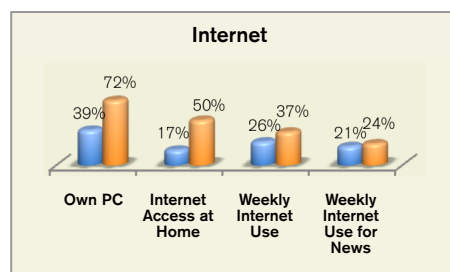
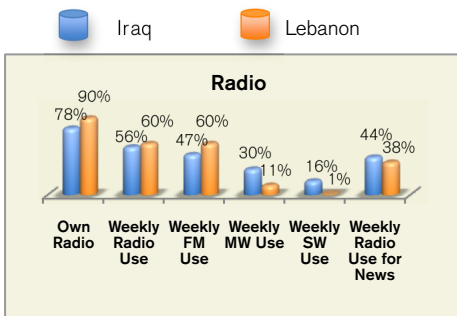
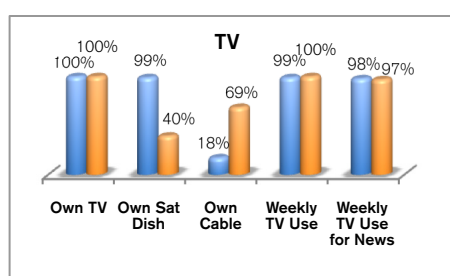
Total Population of Iraq 30 M and Lebanon 3.9 M

	Sam.	MBN-Iraq Wkly. Aud.	Sam.	MBN-Leb. Wkly. Aud.
Sex	%	%	%	%
Male	50	52	49	56
Female	50	48	51	44
Age				
15-24	28	27	28	30
25-34	23	25	23	22
35-44	21	21	17	21
45-54	15	15	13	10
55-64	10	11	10	10
65+	2	3	10	6

	Sam.	MBN-Iraq Wkly. Aud.	Sam.	MBN-Leb. Wkly. Aud.
Education	%	%	%	%
illiterate/No Formal	22	20	3	0
El/Inter.	34	33	33	28
Second.	21	20	29	31
Coll./Univ.	24	26	35	42
Ethnicity/Nationality				
Arabic	90	90	na	na
Kurdish	6	5	na	na
Lebanese	na	na	100	100
Other	4	5	na	na

	Sam.	MBN-Iraq Wkly. Aud.	Sam.	MBN-Leb. Wkly. Aud.
Residence	%	%	%	%
Urban	67	68	42	34
Rural	33	32	58	66
Language Spoken At Home				
Arabic	90	91	na	na
Kurdish	7	6	na	na
Other	3	3	na	na

M E D I A U S E



Iraq Top Ten Media Outlets

1. Alhurra
2. Al Arabiya
3. Al Sharqiya
4. MBC 1
5. Al Jazeera
6. Al Sumeria
7. LBC
8. Al Iraqiya
9. MBC Action
10. Dubai TV

Lebanon Top Ten Media Outlets

1. LBC
2. New TV
3. OTV Lebanon
4. MBC 4
5. MTV Lebanon
6. Al Manar
7. Future TV
8. Al Jazeera
9. MBC Action
10. MBC 1

New Media Index Ranking

	Iraq	Lebanon
Overall Rank	20/54	14/54
Wired Rank	32/54	12/54
Mobile Rank	3/54	18/54

Web Analytics

	Alhurra	Radio Sawa
Weekly Visitors	23,906	254,131
Weekly Visits	54,927	519,480

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index:** Iraq—NOT FREE; Lebanon—PARTLY FREE in 2009
- **Economist Intelligence Unit Instability:** IRAQ—VERY HIGH RISK (7.9); Lebanon—HIGH RISK (7.0)
- There has been little political change in the Arab world in the past year, especially in the oil-rich Gulf monarchies, the kingdoms of Jordan and Morocco, and largely single party systems of Syria, Egypt, and Tunisia. Corruption and nepotism continue to be high throughout the Arab world.
- Despite increased freedom of the press spurred by the rise of satellite television channels and internet use, self-censorship and state censorship still pervade in countries like Tunisia, Syria, Saudi Arabia, and Egypt.
- Democratic elections took place in Lebanon in 2009, but despite a pro-western victory, the new Lebanese Prime Minister had to form a "national unity" government comprised of both pro and anti-western factions. Similarly, Iraqi general elections held in 2010 did not produce enough support for a single party to form a government, so a coalition is expected. Egypt is expected to hold its highly anticipated presidential election in 2011, in which current President Hosni Mubarak may or may not run.

Media Environment

- **Freedom House Press Freedom Index:** Iraq—NOT FREE (144/196); Lebanon—PARTLY FREE (115/196) in 2010
- **Reporters Without Borders Index:** Iraq—53.30 (145/175); Lebanon—15.42 (61/175) in 2009
- State-run media still has a prominent role in many Arab countries, including Saudi Arabia, Syria, and even Jordan. Yet despite the presence of state-run media outlets, Arab audiences have access to a multitude of pan-Arab and international channels, either through cable subscriptions or satellite ownership.
- Pan-Arab news channels Al Jazeera and Al Arabiya have enjoyed much success in the region; many TV viewers look to these channels for the latest news and analyses of important events. Major pan-Arab networks have largely maintained their audiences, but in some markets they have lost viewers to other, mainly local channels. Indeed, privately owned local channels, as well as some state-run media, provide much of the daily news and information to their nationwide audiences.
- Internet use and home internet access has steadily increased across the Arab world. Arabs use the internet for communication and news gathering. Internet users also participate heavily in online social networking activities, particularly through sites like Facebook.
- The Lebanese media environment, where MBN reach is lower than average, is atypical of the region. The peculiar nature of TV distribution, the saturation of the FM space, and extreme factionalism make it a challenging market.



Broadcasting
Board of
Governors

PROFILE



Language of Broadcast: Arabic

Coverage: 28 hrs. of original and 91 hrs. of repeat radio programming per week; Internet

Distribution: Delivery includes 1 cross-Border MW from Kuwait, 12 FM IBB transmitters, HotBird, AsiaSat and Internet with streaming audio.

Staff: 12

Budget: \$2,051,000

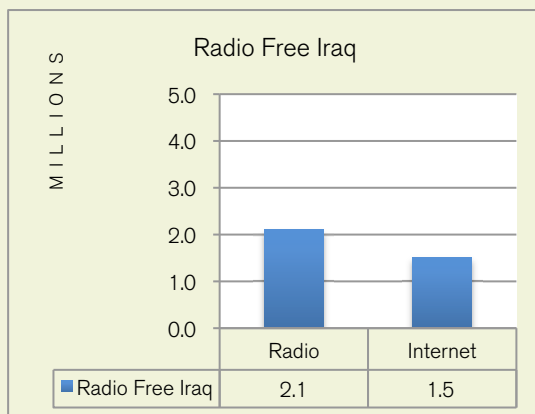
Established: 1998 to present



PERFORMANCE DATA

(Using Data from Iraq, February 2010)

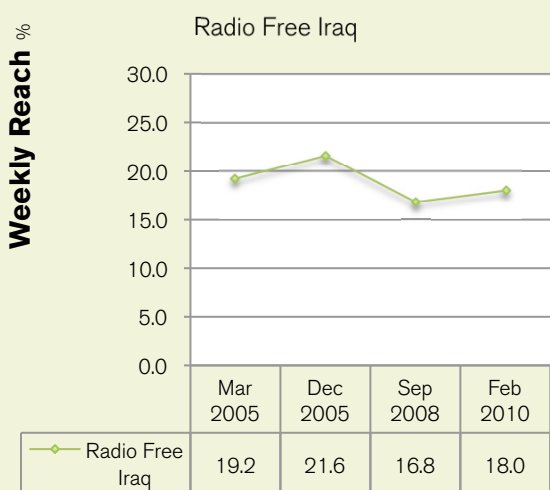
Audience Size



Weekly Reach by Media (%)

Radio Free Iraq	
Radio	11.5
TV	na
Internet	8.3
Total	18.0

Weekly Reach



Awareness (%)

Radio Free Iraq	
	43

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

Radio Free Iraq	
Radio	83
TV	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

Radio Free Iraq	
Current Events	76
Current Events in Iraq	99
U.S. Policies	na

Quality

Combined Scores from audience panel

Radio Free Iraq	
Radio	3.0
TV	na

Data are from a February 2010 nationwide survey of adults (15+) in Iraq.

Arabic

Arabic Broadcasting

Total Population of Iraq: 31.5 million

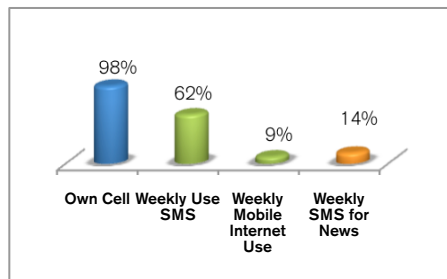
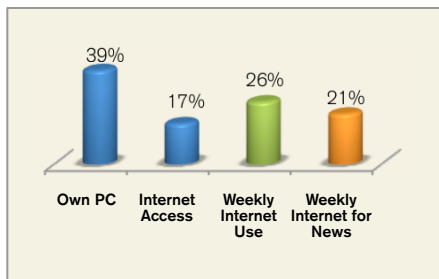
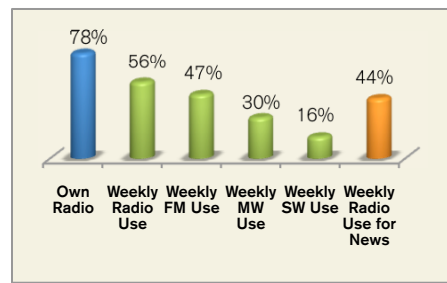
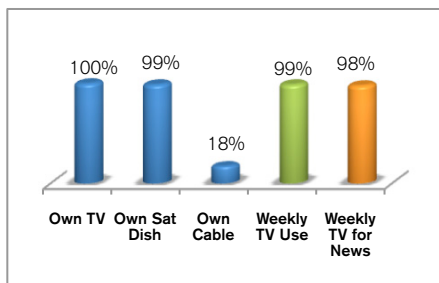
A U D I E N C E C O M P O S I T I O N

	Sample	Radio Free Iraq Weekly Audience
Sex	%	%
Male	49	54
Female	51	56
Age		
15-24	27	29
25-34	24	27
35-44	22	22
45-54	15	13
55-64	10	7
65+	2	2

	Sample	Radio Free Iraq Weekly Audience
Education	%	%
illiterate/No Formal	23	14
Elem./Inter.	34	29
Secondary	20	23
Coll./Univ.	23	34
Ethnicity/Nationality		
Arabic	80	88
Kurdish	15	6
Other	5	5

	Sample	Radio Free Iraq Weekly Audience
Residence	%	%
Urban	67	78
Rural	33	22
Language		
Arabic	80	88
Kurdish	16	7
Other	4	5

M E D I A U S E



Top Ten Media Outlets

1. Alhurra
2. Al Arabiya
3. Al Sharqiya
4. MBC1
5. Al Jazeera
6. Al Sumeria
7. LBC
8. Al Iraqiya
9. MBC Action
10. Dubai TV

New Media Index Rankings

Overall Rank	20/54
Wired Rank	32/54
Mobile Rank	3/54

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: NOT FREE in 2010**
- **Economist Intelligence Unit Instability: HIGH RISK in 2009/2010**
- In March 2010, Iraq held its parliamentary elections. Hundreds of candidates with suspected ties to Saddam Hussein's Baath party were barred from the elections. The opposition bloc, led by Ayad Allawi, won the largest number of seats but not a majority, setting off an eight-month political impasse. In the Fall of 2010, anti-American cleric Muqtada al-Sadr's party gave political support to current PM Nouri al-Maliki, boosting his bid to remain in power; Iraqi lawmakers subsequently agreed to keep al-Maliki as prime minister. In November, the new parliament finally convened and took its first formal step in creating a new government by electing a speaker.
- The U.S. took many steps in 2009-2010 to shift military power back to Iraqis. In January 2009, the U.S. transferred control of Baghdad's Green Zone to Iraqi forces, and in June it withdrew U.S. troops from urban areas. Continuing the trend, the U.S. removed the last of its combat troops from Iraq in August 2010. Some 50,000 U.S. troops remain to advise Iraqis.
- Despite concrete steps to bolster the Iraqi government and security forces, violence in Iraq is still widespread. Bloody attacks targeting Shiite areas were common, such as a May 10, 2010 attack that killed over 100 people. Roadside bombs are common in Baghdad and its suburbs, along with assassinations and kidnappings. People continue to live in fear from militants and gangs. Iraq's minority Christians were the target of two widely publicized attacks in 2010.

Media Environment

- **Freedom House Press Freedom Index : NOT FREE in 2009**
- **Reporters Without Borders Index: 53.30 (145/175) in 2009**
- Internet use has risen significantly in Iraq, from 15 percent in the past week in 2007 to over a quarter (26 percent) in 2009. Thirty-one percent of Iraqi adults go online at least once a month. The Iraqi government has made developing its communications infrastructure a priority, making internet accessible to more Iraqis. Iraqi Internet users log on for news, communication, social networking and entertainment information.
- Television remains the most popular media source in Iraq; nearly all of Iraqis use it weekly for news and information. TV is followed by friends and family, radio, international TV, newspapers and the Internet.
- Iraqi respondents say they prefer international broadcasters because they are more trustworthy than domestic outlets. This may have been especially true during the country's June 2009 Parliamentary elections when political groups heavily used media outlets to promote their candidates and viewpoints.
- Iraqis praise U.S. international broadcasters for their reporting on local issues, particularly Radio Free Iraq (Radio Iraq al Hurr). Radio Iraq al Hurr is a strong competitor in the radio news market, despite its limited programming and broadcast times.



EXPANDED PERFORMANCE DATA

Audience Size & Weekly Reach

Country	Population	Radio Audience Size	Radio Weekly Reach %	TV Audience Size	TV Weekly Reach %	USIB Internet Audience Size	USIB Internet Weekly Reach %
Algeria	23,870,000	46,927	1.2	410,607	10.5	7,821	0.2
Bahrain	584,000	134,320	23	168,192	28.8	na	na
Egypt	52,662,000	3,370,368	6.4	3,949,650	7.5	421,296	0.8
Iraq	18,595,000	RFE/RL-2,138,425 MBN-5,336,765	RFE/RL-11.5 MBN-28.7	11,566,090	62.2	4,332,635	23.3
Jordan	4,248,000	611,712	14.4	603,216	14.2	29,736	0.7
Kuwait	2,072,000	434,067	33.7	274,351	21.3	54,097	4.2
Lebanon	2,886,000	230,880	8.0	199,134	6.9	8,658	0.3
Morocco	22,190,000	3,159,019	31.8	2,076,210	20.9	119,208	1.2
Oman	1,890,000	31,484	1.7	557,452	30.1	64,820	3.5
Palestinian Territories	2,240,000	154,560	6.9	206,080	9.2	24,640	1.1
Qatar	693,000	489,258	70.6	444,213	64.1	na	na
Saudia Arabia	17,112,000	272,007	2.6	1,067,103	10.2	73,233	0.7
Syria	14,016,000	1,509,490	11.5	3,228,996	24.6	262,520	2.0
Tunisia	7,548,000	15,096	.2	596,292	7.9	na	na
UAE	3,520,000	238,440	39.2	104,622	17.2	8,516	1.4

Awareness, Credibility & Understanding

Country	Radio Aware. %	Radio Cred. %	Radio Under. Current Events %	Radio Under. U.S. Culture %	Radio Under. U.S. Policies %	TV Aware. %	TV Cred. %	TV Under. Current Events %	TV Under. U.S. Culture %	TV Under. U.S. Policies %
Algeria	6	94	53	47	52	46	83	52%	47%	52%
Bahrain	28	85	0	0	0	50	73	0%	0%	0%
Egypt	25	99	90	62	51	27	94	86%	58%	51%
Iraq	RFE/RL-43 MBN-71	RFE/RL-83 MBN-74	RFE/RL-76 MBN-95	RFE/RL-100* MBN-95	RFE/RL-NA MBN-50	82	60	76%	35%	50%
Jordan	62	92	45	25	32	65	90	57%	32%	32%
Kuwait	80	97	89	59	70	75	92	86%	68%	70%
Lebanon	34	80	35	27	43	63	74	52%	45%	43%
Morocco	68	96	83	66	62	72	94	72%	63%	62%
Oman	7	100	86	80	74	67	98	84%	75%	74%
Palestinian Territories	33	92	46	71	59	34	85	41%	69%	59%
Qatar	91	89	0	0	0	92	92	0%	0%	0%
Saudia Arabia	20	85	66	50	44	69	85	63%	45%	44%
Syria	51	89	68	43	44	na	8	54%	43%	44%
Tunisia	7	na	0	0	0	48	52	0%	0%	0%
UAE	87	96	72	64	81	93	96	52%	82%	81%

Credibility: Percentage of surveyed weekly audience that found broadcasts credible (%)

Understanding: Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%) * RFE/RL's question was "Understanding of Current Events in Country"

Data are from Algeria, June 2007; Bahrain, June 2006; Egypt, January 2010; Iraq, January and February, 2010; Jordan, January 2010; Kuwait, January 2010; Lebanon, February 2010; Morocco, February 2010; Oman, January 2009; Palestinian Territories, March 2010; Qatar, June 2006; Saudia Arabia, February 2010; Syria, March 2010; Tunisia June 2006; UAE January 2006.

Audience Size & Weekly Reach (cont.)

Country	Population	USIB Audience Size	USIB Weekly Reach %	BBC Unduplicated Audience Size	BBC Unduplicated Weekly Reach %	Other International Broadcaster Audience Size	Other International Broadcaster Weekly Reach %
Algeria	23,870,000	449,712	11.5			Aljazeera- 2,338,504	59.8
Bahrain	584,000	261,632	44.8			RMC- 129,064 Aljazeera- 438,000	RMC- 22.1 Aljazeera- 75
Egypt	52,662,000	6,846,060	13.0	1,843,170	3.5	Aljazeera- 32,492,454	61.7
Iraq	18,595,000	13,723,110	73.8	9,074,360	48.8	Aljazeera- 9,873,945	53.1
Jordan	4,248,000	1,070,496	25.2	628,704	14.8	Aljazeera- 3,576,816	84.2
Kuwait	2,072,000	575,750	44.7	503,621	39.1	Aljazeera- 842,373	65.4
Lebanon	2,886,000	389,610	13.5	178,932	6.2	Aljazeera- 1,327,560	46.0
Morocco	22,190,000	4,261,695	42.9	1,281,489	12.9	Aljazeera- 8,632,664	86.9
Oman	1,890,000	609,308	32.9	287,060	15.5	Aljazeera- 1,227,876	66.3
Palestinian Territories	2,240,000	224,000	10.0	241,920	10.8	Aljazeera- 1,552,320	69.3
Qatar	693,000	598,059	86.3			MBC- 545,391 Aljazeera- 644,490	RMC- 78.7 Aljazeera- 93
Saudia Arabia	17,112,000	1,297,263	12.4	1,098,489	10.5	Aljazeera- 6,193,384	59.2
Syria	14,016,000	4,279,076	32.6			Aljazeera- 10,172,650	77.5
Tunisia	7,548,000	611,388	8.1			RMC- 22,644 Aljazeera- 4,611,828	RMC- .3 Aljazeera- 61.1
UAE	3,520,000	270,678	44.5	149,633	24.6	Aljazeera- 522,500	85.9

Media Use

Country	Own TV	Own Sat. Dish	Own Cable Access	Weekly TV Use	Weekly TV For News	Weekly Radio Use	Weekly FM Use	Weekly MW Use	Weekly SW Use	Weekly Radio For News
Algeria	98%	88%	35%	95%	93%	57%	51%	7%	2%	49%
Bahrain	100%	100%	10%	99%	97%	81%	74%	38%	8%	79%
Egypt	100%	76%	25%	99%	86%	51%	32%	32%	5%	36%
Iraq	99%	17%	1%	98%	94%	44%	21%	10%	5%	36%
Jordan	100%	99%	18%	99%	98%	56%	47%	30%	16%	44%
Kuwait	100%	97%	1%	99%	95%	66%	64%	9%	1%	45%
Lebanon	100%	99%	40%	91%	89%	62%	56%	34%	20%	60%
Morocco	100%	40%	69%	100%	97%	60%	60%	11%	1%	38%
Oman	100%	94%	2%	100%	100%	71%	67%	14%	3%	63%
Palestinian Terr.	100%	99%	5%	98%	80%	74%	66%	40%	20%	51%
Qatar	98%	93%	25%	89%	86%	47%	40%	9%	2%	38%
Saudia Arabia	100%	99%	16%	100%	87%	91%	89%	48%	35%	93%
Syria	100%	97%	11%	99%	95%	71%	66%	20%	9%	64%
Tunisia	100%	98%	18%	99%	83%	58%	41%	10%	5%	21%
UAE	100%	81%	1%	99%	98%	73%	55%	16%	3%	68%

Country	Own PC	Own Int. Acc.	Weekly Internet Use	Weekly Internet For News	Own Cell Phone	Weekly Use SMS	Weekly SMS For News
Algeria	45%	31%	24%	22%	82%	na	15%
Bahrain	79%	73%	43%	41%	95%	na	38%
Egypt	39%	21%	18%	16%	87%	69%	5%
Iraq	56%	34%	24%	20%	80%	65%	53%
Jordan	39%	17%	26%	21%	98%	90%	14%
Kuwait	59%	23%	29%	21%	98%	85%	3%
Lebanon	87%	82%	77%	71%	99%	99%	29%
Morocco	72%	50%	37%	24%	94%	73%	5%
Oman	42%	37%	38%	33%	98%	82%	2%
Palestinian Terr.	52%	35%	32%	16%	97%	94%	22%
Qatar	50%	39%	32%	30%	88%	55%	10%
Saudia Arabia	93%	81%	48%	48%	100%	na	30%
Syria	76%	69%	55%	40%	98%	93%	12%
Tunisia	60%	44%	28%	13%	86%	63%	12%
UAE	15%	7%	8%	9%	70%	na	6%



PROFILE



Language of Broadcast: Armenian

Content: 1.5 hrs. of original and 1.25 hrs. of repeat TV programming per week; Internet

Distribution: 1 affiliate (1 TV)

TV: VOA Armenian broadcasts through its affiliate, Armenia TV, the most watched stations in Armenia.

Web: The service has an Internet site and is also available on Facebook, Twitter and YouTube.

Staff: 2

Budget: \$351,000

Established: 1951 to present; TV programming established in 2004



Language of Broadcast: Armenian

Content: 25 hrs. of original and 14 hrs. of repeat radio programming per week; Internet

Distribution: RFE/RL has 3 FM partners: 2 National and 1 Yerevan affiliate covering the whole country in addition to HotBird and Internet with streaming audio (Armenian site with Russian and English sub sites). "Crossroads of Opinions" is filmed and aired on 5 regional TV stations, along with other short video news reports.

Staff: 6

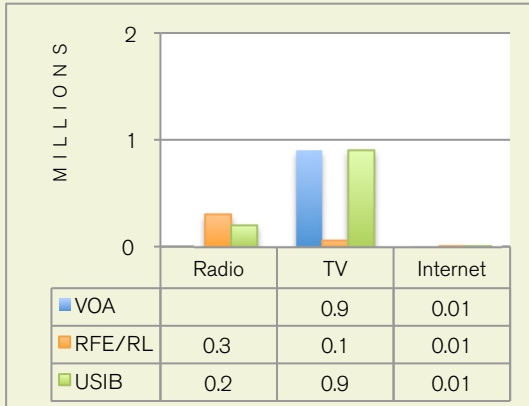
Budget: \$1,445,000

Established: 1953 to present



PERFORMANCE DATA (Using Data from Armenia, March 2010)

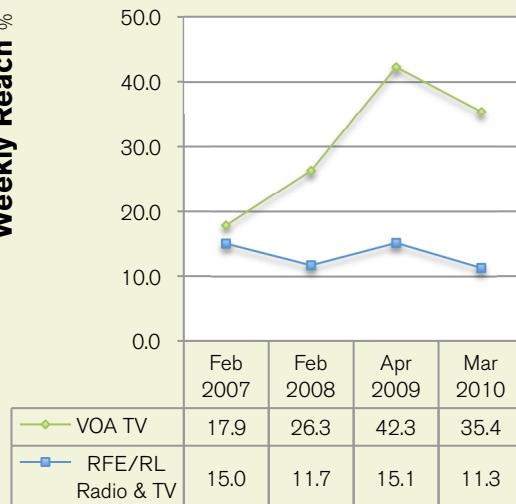
Audience Size



Weekly Reach by Media (%)

	VOA	RFE/RL	USIB
Radio	na	9.5	9.5
TV	35.4	2.4	37.9
Internet	0.4	0.2	0.5
Total	36.1	11.3	41.3

Weekly Reach %



Awareness (%)

VOA	RFE/RL
55	74

Credibility

	VOA	RFE/RL
Radio	na	98
TV	88	89

Understanding

	VOA TV	RFE/RL Radio*
Current Events	78	78
U.S. Culture (VOA) or Current Events in Armenia (RFE/RL)	68	78
U.S. Policies	64	na

Quality

	VOA	RFE/RL
Radio	na	3.0
TV	3.1	na

*Understanding ratings for RFE/RL TV are 50% for Current Events.

Data are from a March 2010 nationwide survey of adults (15+) in Armenia.

Armenian Broadcasting

Total Population of Armenia: 3.1 million

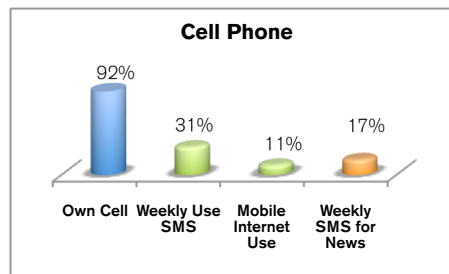
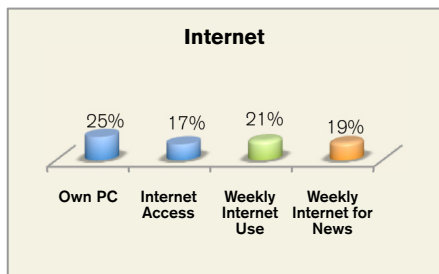
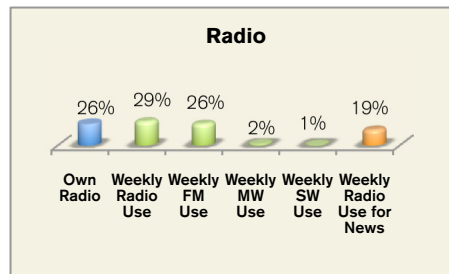
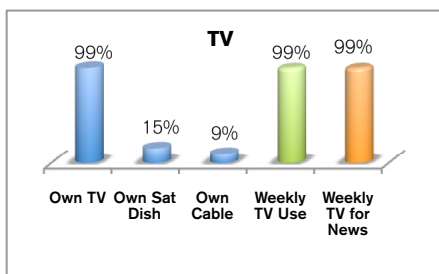
A U D I E N C E C O M P O S I T I O N

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
Sex	%	%	%
Male	44	41	56
Female	56	59	44
Age			
15-24	24	22	25
25-34	18	18	17
35-44	21	24	17
45-54	15	16	20
55-64	9	9	13
65+	13	11	8

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
Education	%	%	%
None	2	1	0
Primary	5	3	4
Secondary	52	50	44
Technical	21	24	26
Coll./Univ.	19	21	27
Ethnicity/Nationality			
Armenian	98	99	98
Russian	1	1	1
Other	1	0	1

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
Residence	%	%	%
Urban	60	69	69
Rural	40	31	31
Language			
Armenian	99	99	99
Russian	1	1	1

M E D I A U S E



Top Ten Media Outlets

1. Armenian TV 1H1
2. Armenian TV 2H2
3. Shant
4. Armenia
5. ORT-1 Evraziya
6. RTR Planeta
7. TV5
8. ALM
9. Armenakob
10. Dar 21/Muz TV

Top Ten Sources of News

1. Shant
2. Armenia TV
3. Armenian TV 1H1
4. RTR Planeta
5. ALM
6. ORT
7. Armenian TV 2H2
8. RFE/RL
9. Erkir Media
10. Kentron

New Media Index Rankings

Overall Rank	17/54
Wired Rank	26/54
Mobile Rank	7/54

Web Analytics

VOA Weekly Visitors	560
Weekly Visits	1,070
RFE/RL Weekly Visitors	11,570
Weekly Visits	39,796

C O N T E X T



Stability



Political Freedom



Press Freedom



Ease of Distribution



Competition

Political Situation

- **Freedom House Political Freedom Index: PARTLY FREE in 2010**
- **Economist Intelligence Unit Instability: HIGH RISK (5.8) in 2009/2010**
- Although, freer than other FSU countries, only limited political and civil freedoms are supported in Armenia. International observers noted widespread fraud during the 2008 elections; bribes defined the candidates' success.
- Government corruption persists. Police crimes perpetrated during the events of March 2008 remain unpunished and many jailed journalists are still behind bars. While academic and religion freedoms are respected, the government severely restricts freedom of assembly.
- Armenia's legal framework is generally supportive of the freedom of speech. However, low awareness of laws surrounding this freedom furthers self-censorship among journalists.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (146/196) in 2010**
- **Reporters Without Borders Index: 31.13 (111/175) in 2009**
- TV is the leading source of information and the competition within the TV market is tight (radio listening and set ownership have experienced severe declines over the past several years.) Russia-originated channels have a strong presence.
- The events of March 2008 created a demand for "hard news" and helped boost the reach of international broadcasters, but this interest is beginning to fade, and Armenians are showing renewed interest in non-political topics.
- The quality of professional journalism in Armenia remains low; journalists neglect professional standards and present unverified information and biased analysis during newscasts.
- New media such as mobile and fixed Internet is transforming newsgathering habits of Armenians. In 2010, use of the Internet for news and information surpassed use of radio as a daily informational resource.
- Public access to information has been improving; Internet and satellite TV remain exempt from state registration. However, many suspect that the Armenian government has been using the process of digitalizing national media outlets as a reason to withdraw the licenses of pro-opposition broadcasters.



Broadcasting
Board of
Governors

PROFILE



Voice of America®



Language of Broadcast: Azerbaijani (or Azeri)

Content: 3.5 hrs of original and 3.5 hrs. of repeat radio programming per week; 1 hr. of original and 1.75 hrs. of repeat TV programming per week; Internet

Distribution: 3 IBB SW frequencies and Satellite

Radio: The VOA Azerbaijani radio show is available on Turksat; 3.5 hours of repeat programming is carried via IBB SW frequencies

TV: VOA Azerbaijani airs programs *Azerbaijani Daily* and *Review of the Week* via Eutelsat Hotbird.

Staff: 5

Budget: \$786,000

Established: 1951 to 1953; 1982 to present; TV service established in 2005



RadioFreeEurope
RadioLiberty



Language of Broadcast:

Azerbaijani (or Azeri)

Content: 29 hrs. of original and 37 hrs. of repeat radio programming per week; Internet; weekly newspaper

Distribution: RFE/RL's delivery includes multiple SW frequencies, TurkSat, HotBird, Internet (Azeri with Russian sub-site) with proxies and streaming audio plus weekly publication of 10,000 newspapers with web content.

Staff: 7

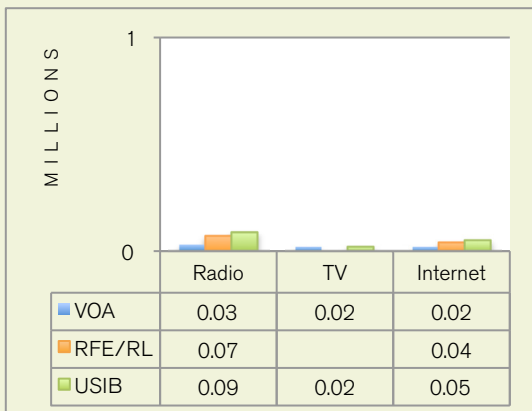
Budget: \$1,786,000

Established: 1953 to present



PERFORMANCE DATA (Using Data from Azerbaijan, March 2010)

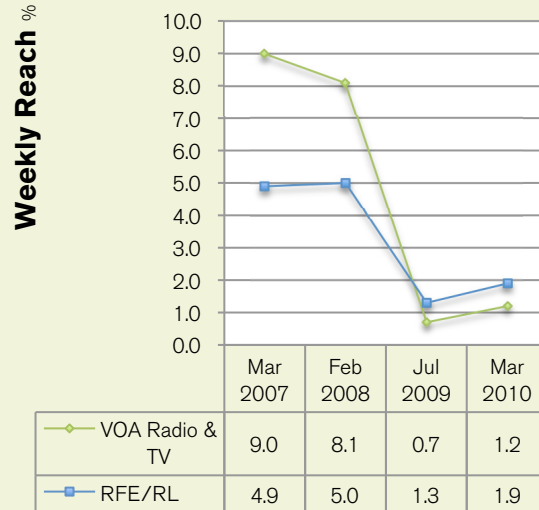
Audience Size



Weekly Reach by Media (%)

	VOA	RFE/RL	USIB
Radio	0.6	1.3	1.6
TV	0.4	na	0.4
Internet	0.3	0.8	0.9
Total	1.2	1.9	2.6

Weekly Reach



Awareness (%)

VOA	RFE/RL
37	53

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)*

	VOA	RFE/RL
Radio	na	na
TV	na	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)*

	VOA	RFE/RL
Current Events	na	na
U.S. Culture (VOA) or Current Events in Azerbaijan (RFE/RL)	na	na
U.S. Policies	na	na

Quality

Combined Scores from audience panel

	VOA	RFE/RL
Radio	na	3.4
TV	3.5	na

*Samples of VOA and RFE/RL weekly audiences in the survey are too small for meaningful analysis.

Data are from a March 2010 nationwide survey of adults (15+) in Azerbaijan.

Azerbaijani Broadcasting

A U D I E N C E C O M P O S I T I O N

Total Population of Azerbaijan: 8.8 million

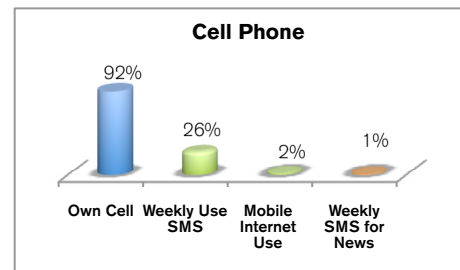
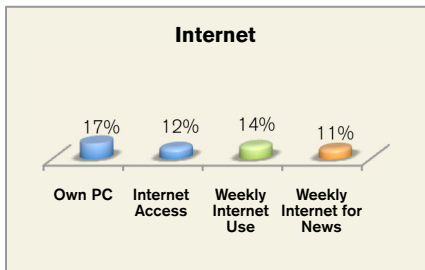
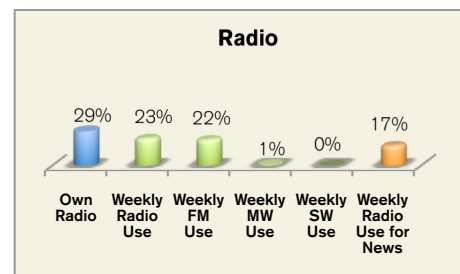
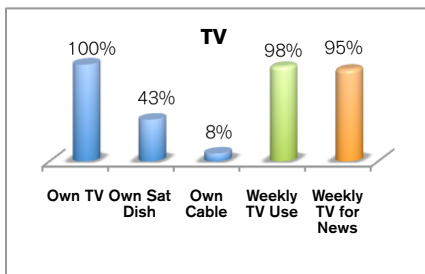
	Sample	VOA Weekly Aud.*	RFE/RL Weekly Aud.*
Sex	%	%	%
Male	49	na	na
Female	51	na	na
Age			
15-24	25	na	na
25-34	25	na	na
35-44	19	na	na
45-54	14	na	na
55-64	10	na	na
65+	7	na	na

	Sample	VOA Weekly Aud.*	RFE/RL Weekly Aud.*
Education	%	%	%
None	1	na	na
Primary	16	na	na
Secondary	52	na	na
Technical	17	na	na
Coll./Univ.	15	na	na
Ethnicity/Nationality			
Azerbaijani	93	na	na
Russian	2	na	na
Other	6	na	na

	Sample	VOA Weekly Aud.*	RFE/RL Weekly Aud.*
Residence	%	%	%
Urban	51	na	na
Rural	49	na	na
Language			
Azerbaijani	92	na	na
Russian	4	na	na
Other	4		

*Samples of VOA and RFE/RL weekly audiences in the survey are too small for meaningful analysis.

M E D I A U S E



Top Ten Media Outlets

1. ANS TV
2. ATV
3. Khazar
4. Azerbaijan Public TV
5. Lider
6. AzTV
7. Space
8. STV (Turkey)
9. Idman Azerbaijan
10. ORT-1 Evraziya

Top Ten Sources of News

1. ANS TV
2. Khazar
3. ATV
4. Azerbaijan Public TV
5. AzTV
6. Lider TV
7. ORT-1 Evraziya
8. STV (Turkey)
9. www.day.az
10. Rossiya

New Media Index Rankings

Overall Rank	37/54
Wired Rank	33/54
Mobile Rank	38/54

Web Analytics

VOA Weekly Visitors	1,040
Weekly Visits	2,310
RFE/RL Weekly Visitors	25,706
Weekly Visits	70,577

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: NOT FREE in 2010**
- **Economist Intelligence Unit Instability: MODERATE RISK (5.2) in 2009/2010**
- Azerbaijan is an authoritarian petro-state, in which all power is held by president Ilham Aliyev, oil revenues dominate the government budget, and the government dominates the economy.
- A March 2009 referendum, which eliminated presidential terms limits, has further consolidated the effective dictatorship of Mr. Aliyev.
- Opposition parties exist and have token representation in the Azeri parliament, but enjoy no real influence or hope of gaining power through ordinary political processes.
- Public opinion is dominated by resentment over the continuing Armenian occupation of Nagorno-Karabakh and surrounding provinces.
- Azerbaijan is highly corrupt even by the standards of the former Soviet Union. Oil revenues have fueled a building boom in Baku, but have not dispelled the problem of persistent unemployment in the regions.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (178/196) in 2010**
- **Reporters Without Borders Index: 53.50 (146/175) in 2009**
- Although the government exerts a high degree of control over the media in Azerbaijan, newspapers, the Internet, and satellite TV give Azeris access to some independent sources of information.
- Despite Azerbaijan's record of jailing opposition journalists on trumped-up charges there continue to be opposition journalists to arrest. While the government dominates Azerbaijani TV and radio, some of the country's leading newspapers favor the opposition.
- The release from jail, on 19 March 2010 of Ganimat Zahid, editor of opposition newspaper Azadlig, is a positive sign, but is offset by the ongoing imprisonment of Emin Milli and Adnan Hadji-zadeh, two bloggers who were arrested on 8 July 2009 on trumped-up charges of "hooliganism" after satirizing corrupt transactions by the government.
- Since January 2009, international broadcasters, including RFE/RL, are no longer able to use national frequencies. RFE/RL has responded by aggressively working to attract new audiences to the TurkSat audio stream that launched in April 2009 and the service has dedicated additional resources to its website.
- Newspapers and the internet, the freest media in Azerbaijan, reach only a small minority of the population, and radio is in decline as well.
- By far the most important medium of communication in Azerbaijan is TV, to which virtually all Azerbaijanis have access, and which the average spends 5.5 hours per day watching.
- Azerbaijanis lost access to Russian stations in 2007, but since then a surge in satellite ownership has resulted in almost half the population having access to a large array of international, mainly Turkish, channels. Although this seems to be mainly for entertainment, it still represents an erosion of the government's domination of the media environment.

PROFILE



Language of Broadcast: Bangla

Content: 7 hrs. of original radio programming per week; 0.25 hrs. of original TV programming per week; Internet

Distribution: 2 affiliates (1 FM, 1 TV), 1 IBB MW and 2 SW frequencies

Radio: The service's main FM affiliate is *Radio Today*, the top-rated private FM station in the capital, Dhaka. The service broadcasts five minutes daily, in addition to a VOA English newscast that is produced through a party contracted by the Office of Marketing and Program Placement.

TV: Bangla's 10 to 12 minute TV program, *Barta*, which is soon to be called *America, America*, is broadcast every Friday on NTV, the 4th most watched TV channel in Bangladesh, and repeated on Saturday.

Staff: 12

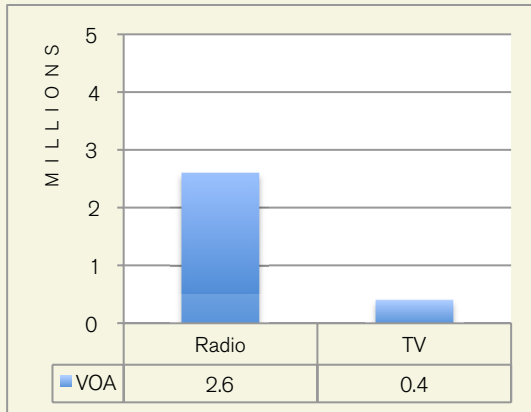
Budget: \$1,596,000

Established: 1958 to present



PERFORMANCE DATA (Using Data from Bangladesh, July 2009)

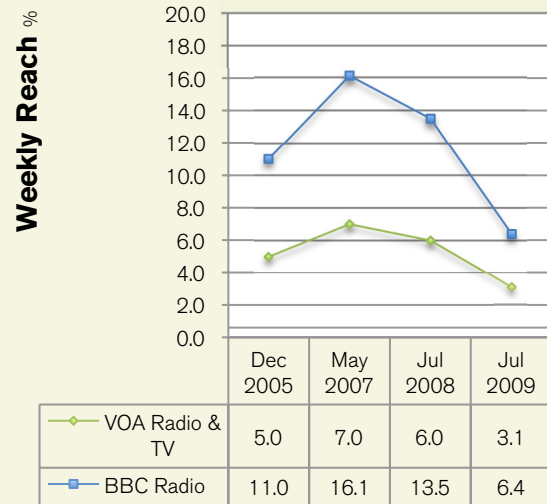
Audience Size



Weekly Reach (%) By Media

VOA	
Radio	2.7
TV	0.4
Internet	< .1
Total	3.1

Weekly Reach %



Awareness (%)

VOA	
	43

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

VOA	
Radio	96
TV	99

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

VOA Radio*	
Current Events	97
U.S. Culture	73
U.S. Policies	56

Quality

Combined Scores from audience panel

VOA	
Radio	3.4
TV	3.5

* Understanding ratings for VOA TV are 89% for Current Events, 22% for U.S. Culture and 50% for U.S. Policies.

Data are from a July 2009 nationwide survey of adults (15+) in Bangladesh.

Bangla Broadcasting

Total Population of Bangladesh: 162.2 million

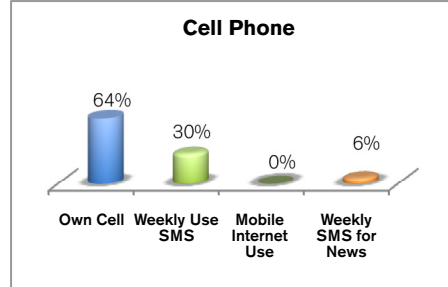
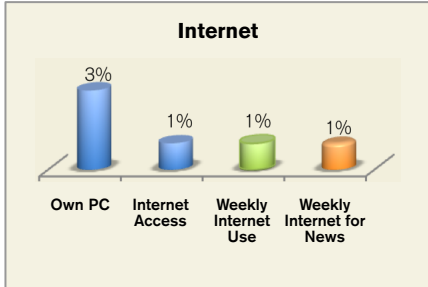
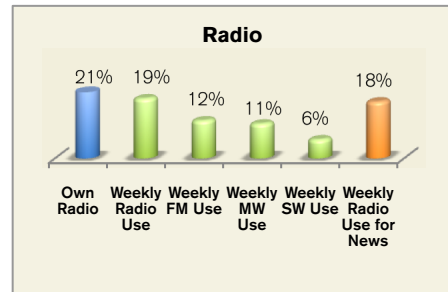
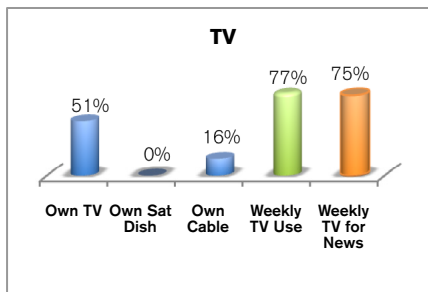
A U D I E N C E C O M P O S I T I O N

	Sample	VOA Weekly Audience
Sex	%	%
Male	50	84
Female	50	16
Age		
15-24	25	27
25-34	30	30
35-44	23	20
45-54	12	11
55-64	7	9
65+	3	3

	Sample	VOA Weekly Audience
Education	%	%
illiterate/No Formal	25	9
Elem./Inter.	22	16
Secondary	30	23
Coll./Univ.	23	53
Ethnicity/Nationality		
na		

	Sample	VOA Weekly Audience
Residence	%	%
Urban	24	37
Rural	76	63
Language		
Bangla	99	100
Hindi	1	0

M E D I A U S E



Top Ten Media Outlets

1. Bangladesh TV (BTV)
2. Channel I
3. ATN Bangla
4. NTV
5. Ekushey TV
6. Channel One
7. BTV World
8. RTV
9. Baishakhi TV
10. ETV Bangla

Top Ten Sources of News

1. Bangladesh TV (BTV)
2. DK
3. Channel I
4. ATN Bangla
5. NTV
6. Protham Alo
7. Ekushey TV
8. BBC
9. Channel One
10. BTV World

New Media Index Rankings

Overall Rank 50/54
Wired Rank 49/54
Mobile Rank 48/54

Web Analytics

Weekly Visitors 1,355
Weekly Visits 2,470

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: PARTLY FREE in 2010**
- **Economist Intelligence Unit Instability: VERY HIGH RISK (7.5) in 2009/2010**
- After a caretaker government, Sheikh Hasina, head of Awami League, became Bangladesh's prime minister for the second time in January 2009.
- Hasina's victory continues over ten years of switching between her party and BNP led by arch rival Khaleda Zia. Both have been charged with corruption in the past and their rivalry and subsequent political disruption led to the suspension of elections in 2007 and the government's declaring a state of emergency.
- Bangladesh has faced some Islamist originated terrorism, which has abated since 2007. However its main challenges are widespread poverty and frequent natural disasters.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (118/196) in 2010**
- **Reporters Without Borders Index: 37.33 (121/175) in 2009**
- Bangladesh has an outspoken press, although journalists are frequently subject to violence and intimidation by both government and other actors.
- Bangladesh has just one state run TV channel, BTV. Those who can, watch cable channels that provide reliable news, as well as Indian channels.
- Within the past 3 years a number of private FM radio channels have received licenses and are able to broadcast news. However, these are limited to the largest cities only. Elsewhere, only state run Betar is available.
- Internet is still limited to an urban elite, but mobile phone ownership is widespread throughout the country.



PROFILE



Language of Broadcast: Belarusian

Content: 21 hrs. of original and 35 hrs. of repeat radio programming per week; 0.5 hrs. of original and 0.5 hrs. of repeat TV programming per week; Internet

Distribution: 1 affiliate (1 MW), 2 IBB SW frequencies

RFE/RL's delivery includes 1 cross border MW affiliate from Lithuania, multiple SW frequencies, HotBird, Internet with streaming audio plus 30 minutes weekly TV on Warsaw-based BelSat's Astra and Sirius satellite.

Staff: 13

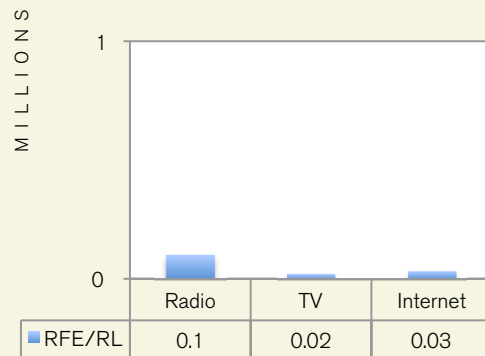
Budget: \$3,111,000

Established: 1954 to present



PERFORMANCE DATA (Using Data from Belarus, October 2009)

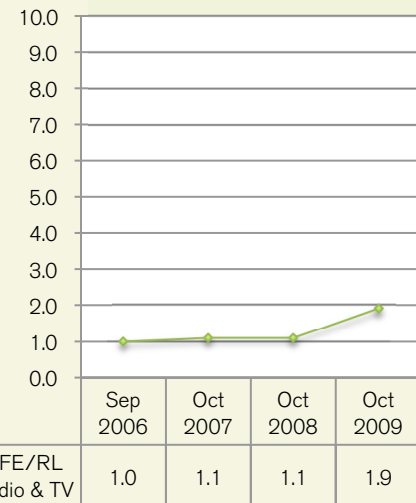
Audience Size



Weekly Reach (%) by Media

RFE/RL	
Radio	1.7
TV	0.3
Internet	0.4
Total	1.9

Weekly Reach % *



Awareness (%)

RFE/RL

29

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)**

RFE/RL	
Radio	na
TV	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)**

RFE/RL	
Current Events	na
Current Events in Belarus	na
U.S. Policies	na

Quality

Combined Scores from audience panel

RFE/RL	
Radio	3.3
TV	na

* Weekly reach figures include TV beginning in October 2008.

** Sample of weekly RFE/RL audience is too small for meaningful analysis.

Data are from an October 2009 nationwide survey of adults (15+) in Belarus.

Belarusian Broadcasting

Total Population of Belarus: 9.7 million

A U D I E N C E C O M P O S I T I O N

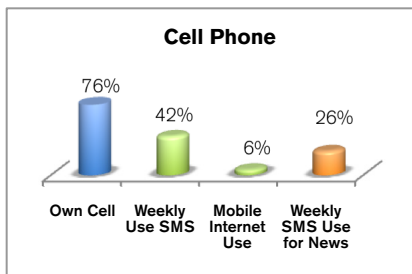
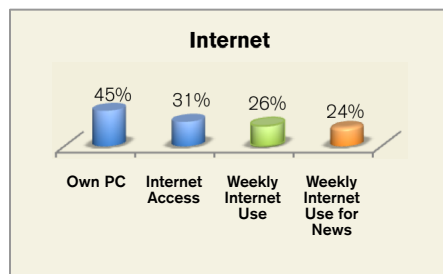
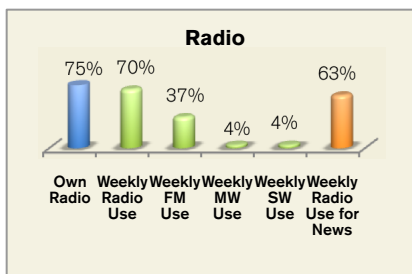
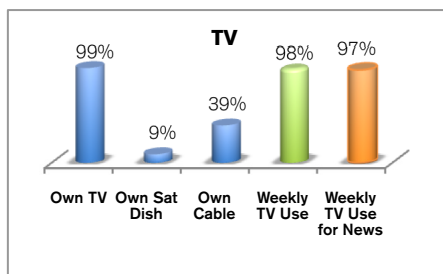
	Sample	RFE/RL Weekly Audience**
Sex	%	%
Male	46	na
Female	54	na
Age		
15-24	18	na
25-34	17	na
35-44	17	na
45-54	19	na
55-64	12	na
65+	17	na

	Sample	RFE/RL Weekly Audience**
Education	%	%
None	3	na
Primary	12	na
Secondary	62	na
Coll./Univ.	23	na
Ethnicity/Nationality		
Belarusian	86	na
Russian	9	na
Other	6	na

	Sample	RFE/RL Weekly Audience**
Residence	%	%
Urban	74	na
Rural	26	na
Language		
Belarusian	4	na
Russian	64	na
Mix of Bel./Russ.	32	na

**Sample of weekly RFE/RL audience is too small for meaningful analysis.

M E D I A U S E



Top Ten Media Outlets

1. ONT
2. BT-1
3. RTR-Belarus
4. NTV-Belarus
5. LAD
6. STV
7. Belarus Radio 1
8. Mir
9. Radius FM
10. Discovery Channel

Top Ten Sources of News

1. ONT
2. BT-1
3. NTV-Belarus
4. RTR-Belarus
5. Belarus Radio 1
6. SB Belarus Segodnya
7. Komolskaya Pravda
8. Euronews
9. www.tutby
10. www.yandex.ru

New Media Index Rankings

Overall Rank	7/54
Wired Rank	6/54
Mobile Rank	10/54

Web Analytics

Weekly Visitors	8,137
Weekly Visits	34,683

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: NOT FREE in 2010**
- **Economist Intelligence Unit Instability: MODERATE RISK (4.8) in 2009/2010**
- The long time president of Belarus, Aleksander Lukashenka, continues to have a tight grip on the country's political and economic situation. However, some changes have taken place. In 2009 Belarus joined the EU Eastern Partnership program and after a 13-year travel ban, President Lukashenka was allowed to visit Italy and Lithuania.
- The relationship with Russia, on the other hand, continues to deteriorate over the issues of gas transportation to Europe, export of Belarusian goods to Russia, and Russia's involvement in Belarusian internal politics.
- The next presidential election in Belarus is expected in late 2010 or early 2011, with the exact date still to be set by the Belarusian parliament. In preparation for the elections, the government launched yet another series of attacks on the opposition leaders as more political activists were arrested in 2009.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (189/196) in 2010**
- **Reporters Without Borders Index: 59.50 (151/175) in 2009**
- Belarus media environment continues to be hostile to independent media. Some improvements were seen in 2009, but with the approaching presidential elections, these are being scaled back.
- Independent voices continue to be repressed. For example, in spring 2010, the Belarusian police raided apartments of the opposition journalists tied to website www.charter97.org, and newspapers Narodnaya Volya and Nasha Niva.
- The Internet is becoming a popular venue for alternative news. Blog readership among regular Internet users in 2009 nearly doubled from 2008 levels.
- The government is attempting to regulate Internet use and the blogosphere. By a special ruling of the Cabinet of Ministers, all Belarusian online resources and Internet providers are expected to register with authorities by July 1, 2010. Some believe this move will make it easier for the government to intimidate or prosecute online content providers.
- In 2009 the government enacted new legislation that makes criticism of the president and government a criminal offense, punishable by prison sentences or high fines.

PROFILE



Voice of America



Language of Broadcast: Bosnian†

Content: 2.75 hrs. of original TV programming per week; Internet

Distribution: TV: VOA's Bosnian Service's *Studio Washington* is broadcast by satellite and on 15 television stations throughout Bosnia Herzegovina. VOA Bosnian also produces a weekly live-to-tape TV interactive for the nationally broadcast and top-rated BHT1 network. The interactive is part of the political and foreign affairs show *Global*, which airs Sunday at local prime time.

Web: The Bosnian Service maintains an up-to-date website, provides updates on Twitter and Facebook, keeps a blog on blogger.ba, and provides video on YouTube.

Staff: 5

Budget: \$717,000

Established: 1996 to present; TV service established in 1997



RadioFreeEurope
RadioLiberty



Language of Broadcast: Bosnian

Content: 10.5 hrs. of original radio programming per week; Internet ††

Distribution: RFE/RL's delivery includes 46 FM stations plus 9 TV affiliates covering the whole country in addition to HotBird and Internet with streaming audio.

Staff: 17††

Budget: \$4,410,000††

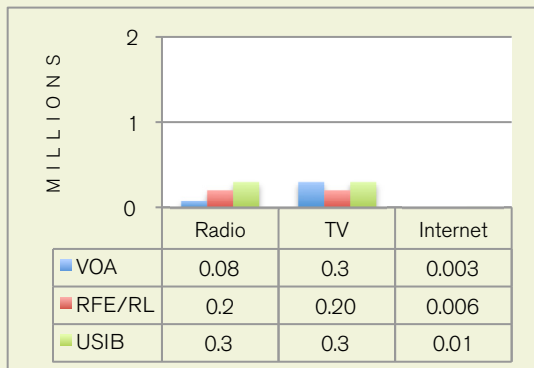
Established: 1994 to present

†† Numbers reflect RFE/RL Balkan service totals which include Albanian, Bosnian, Macedonian, Montenegrin and Serbian.



PERFORMANCE DATA (Using Data from Bosnia-Herzegovina, July 2010)

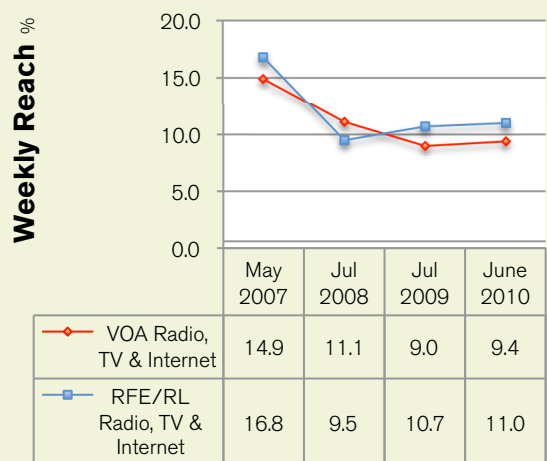
Audience Size



Weekly Reach by Media (%)

	VOA	RFE/RL	USIB
Radio	2.5	7.0	7.9
TV	7.7	5.2	10.1
Internet	0.1	0.2	0.3
Total	9.4	11.0	15.7

Weekly Reach



Awareness (%)

VOA	RFE/RL
73	76

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

	VOA	RFE/RL
Radio	96	86
TV	90	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

	VOA TV*	RFE/RL
Current Events	91	84
U.S. Culture (VOA)/Current Events in Bosnia	91	84
U.S. Policies	73	na

Quality

Combined Scores from audience panel

	VOA	RFE/RL
Radio	3.6	3.3
TV	3.4	na

*Understanding ratings for RFE/RL TV are 91% for Current Events and 90% for Current Events in Bosnia-Herzegovina. Understanding ratings for VOA radio in Bosnia are not available.

†VOA broadcasts to Bosnia-Herzegovina in Bosnian, Serbian and Croatian, all of which can be reviewed on respective pages in this book.

Data are from a July 2010 nationwide survey of adults (15+) in Bosnia-Herzegovina.

Bosnian Broadcasting

A U D I E N C E C O M P O S I T I O N

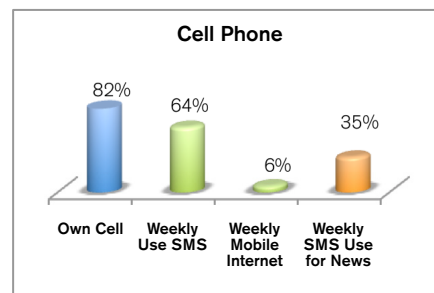
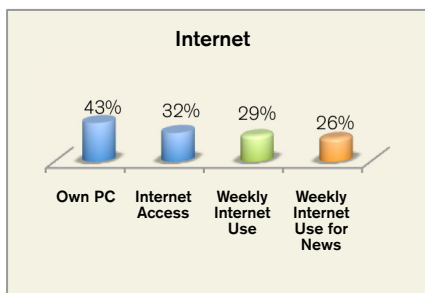
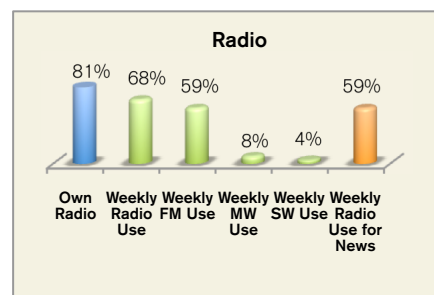
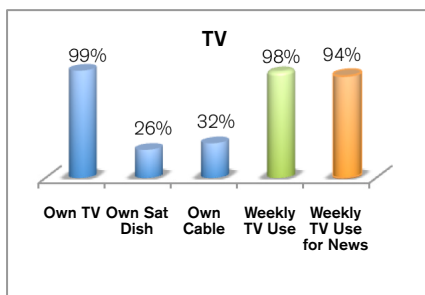
Total Population of Bosnia-Herzegovina: 3.8 million

	Sam.	VOA Weekly Aud.	RFE/RL Weekly Aud.
Sex	%	%	%
Male	49	55	51
Female	51	45	49
Age			
15-24	16	11	9
25-34	20	16	15
35-44	16	16	19
45-54	16	22	19
55-64	16	20	23
65+	17	15	15

	Sam.	VOA Weekly Aud.	RFE/RL Weekly Aud.
Education	%	%	%
None	3	2	2
Primary	24	18	23
Secondary	59	63	61
Higher	14	17	14
Ethnicity/Nationality			
Bosniak	47	64	70
Bosnian	3	4	3
Serbian	37	16	20
Croatian	11	12	7
Other	2	3	2

	Sam.	VOA Weekly Aud.	RFE/RL Weekly Aud.
Residence	%	%	%
Urban	49	52	49
Rural	51	47	51
Language			
Bos/Ser/Cro	98	97	98
Other	2	3	2

M E D I A U S E



Top Ten Media Outlets

1. FTV (1,2)
2. BHT 1
3. Pink BH
4. HRT (1,2,3)
5. OBN
6. RTRS
7. RTL (Hrvatska)
8. Mreza +
9. TV BN
10. NTV Hayat (Sarajevo)

Top Ten Sources of News

1. FTV (1,2)
2. BHT 1
3. RTRS
4. HRT (1,2,3)
5. Pink BH
6. Dnevni avaz
7. TV BN
8. NTV Hayat
9. OBN
10. Nova

New Media Index Rankings

Overall Rank	9/54
Wired Rank	15/54
Mobile Rank	10/54

Web Analytics

VOA Weekly Visitors	2,078
Weekly Visitors	4,073
RFE/RL Weekly Visitors	na
Weekly Visits	na

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: PARTLY FREE in 2010**
- **Economist Intelligence Unit Instability: VERY HIGH RISK (7.5) in 2009/2010**
- Ethnic divisions between the three main groups – Muslims, Serbs and Croats – remain strong in Bosnia. The country has been unable to shake off the legacy of the 1992-1995 war. Hopes that Bosnian politicians could steer the country away from the past without the help of the international community have proven premature.
- Negotiations to strengthen the central government in Sarajevo and transform the country into a unified parliamentary democracy have been stalled. In the run-up to general election on October 3, 2010, tensions were running high. The early results of this election had outside observers lamenting over political stagnation along ethnic lines.
- Over the past year, Republika Srpska, the Serb-dominated entity, has repeatedly threatened to secede. The Croats are calling for an autonomous entity of their own and the Bosnian Muslims are calling for a new constitution to reshape the current highly decentralized government structure.
- Bosnia's political turmoil is diminishing the country's chances of integration into the EU structures. Technically, at present, Bosnia cannot apply for EU membership because it is still under international guardianship.

Media Environment

- **Freedom House Press Freedom Index: PARTLY FREE (97/196) in 2010**
- **Reporters Without Borders Index: 10.5 (39/175) in 2009**
- Bosnia's tense and fractured political life is reflected in the media as well. Bosnia's media outlets continue to target specific ethnic groups and hence contribute to ethnic divisions.
- The public broadcasters, the most influential media in Bosnia, are seen as unable to fulfill their main responsibility of providing the public with unbiased information due to unabating political pressure and growing competition from commercial outlets.
- A sign of the worsening media situation in the country is the recent adoption of a law on FTV, which enables the entity's parliament to appoint members of the broadcaster's governing body.
- The media are not self-sustainable and are often affiliated with political parties or business interests. Media owners often dictate editorial policy.
- The media market is overcrowded, but, as in the rest of the region, the large number of media outlets has not generated an open exchange of diverse opinions. News content is often indistinguishable from commissioned reports and advertising



PROFILE



Voice of America®



Language of Broadcast: Burmese

Content: 25 hrs. of original and 17 hrs. of repeat radio programming per week; 0.5 hrs. of original and 3 hrs. of repeat TV programming per week; Internet

Distribution: 1 affiliate (TV), 1 MW, 5 IBB SW frequencies
Radio: The Service's programming is available on one MW and 5 IBB SW frequencies.

TV: VOA Burmese programming is available on IBB satellites (AsiaSat 3 and IOR) and a local affiliate in southern Thailand near the border. Affiliate Sangkhalaburi Cable puts the entire package of VOA TV programming, including VOA English and other languages, on 24/7 to local households.

Internet: The Service maintains a website and is available on YouTube, Twitter, Facebook, the VOA Burmese Blog (voaburmese.wordpress.com), and sends out an e-mail newsletter to more than 1500 subscribers.

Staff: 13

Budget: \$2,406,000

Established: 1943 to 1945; 1951 to present



Radio Free Asia



Language of Broadcast: Burmese

Content: 21 hrs. of original and 21 hrs. of repeat radio programming per week; Internet

Distribution: RFA is found on 1-3 IBB SW frequencies; Satellite rebroadcasting

Staff: 17

Budget: \$2,498,000

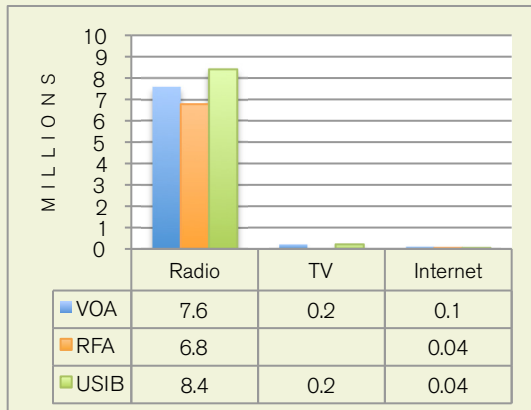
Established: 1997 to present



PERFORMANCE DATA

(Using Data from Burma, August 2009)

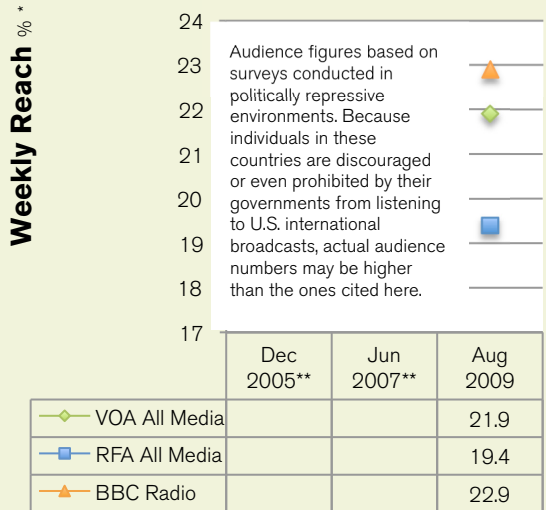
Audience Size



Weekly Reach by Media (%)

	VOA	RFA	USIB
Radio	21.6	19.4	24.1
TV	0.7	na	0.7
Internet	<0.1	0.1	<0.1
Total	21.9	19.4	24.1

Weekly Reach %



Awareness (%)

VOA	RFA
75	68

Credibility

	VOA	RFA
Radio	90	89
TV	na	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)***

	VOA	RFA
Current Events	91	90
U.S. Culture (VOA) or Current Events in Burma (RFA)	na	na
U.S. Policies	na	na

Quality

Combined Scores from audience panel

	VOA	RFA
Radio	3.4	3.0
TV	na	na

*Due to differences in the sample areas and in weighting among recent surveys, trend data are not available.

** Dates reflect sub-national surveys; trending not possible with sub-national surveys.

***Understanding question not asked for reasons of political sensitivity.

Data are from an August 2009 nationwide survey of adults (15-64) in Burma.

Burmese Broadcasting

Total Population of Burma: 50 million

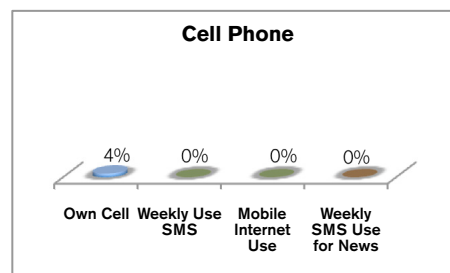
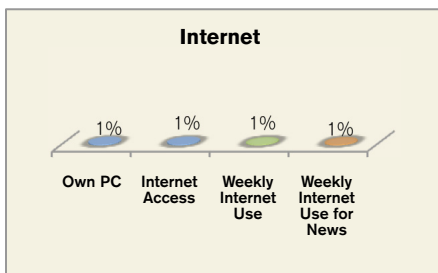
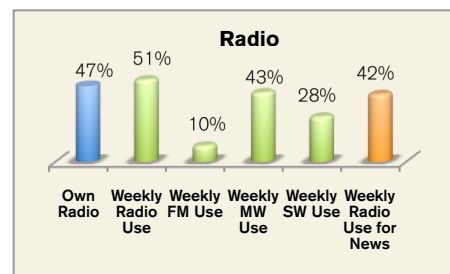
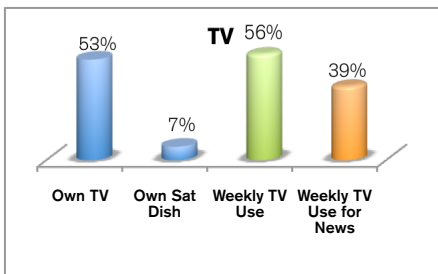
A U D I E N C E C O M P O S I T I O N

	Sample	VOA Weekly Aud.	RFA Weekly Aud.
Sex	%	%	%
Male	50	66	67
Female	50	34	33
Age			
15-24	28	23	23
25-34	25	27	25
35-44	21	23	22
45-54	15	18	18
55-64	10	10	12
65+	na	na	na

	Sample	VOA Weekly Aud.	RFA Weekly Aud.
Education	%	%	%
None/Monastic	42	32	34
Secondary	45	53	52
Coll./Univ.	13	15	14
Ethnicity/Nationality			
Bamar	73	73	75
Shan	7	5	5
Rakhine	5	8	8
Karen	5	4	4
Other	10	10	9

	Sample	VOA Weekly Aud.	RFA Weekly Aud.
Residence	%	%	%
Urban	31	30	30
Rural	69	70	70
Language			
Burmese	79	78	79
Shan	6	5	4
Rakhine	5	8	8
Other	9	9	9

M E D I A U S E



Top Ten Media Outlets

1. MRTV
2. Myanmar Radio
3. Myawaddy TV
4. Padauk Myay Radio
5. BBC Burmese
6. VOA Burmese
7. RFA Burmese
8. MRTV-4
9. Madalay City DC FM
10. MRTV-3

Web Analytics

VOA Weekly Visitors	19,177
Weekly Visits	98,641
RFA Weekly Visitors	18,893
Weekly Visits	61,497

New Media Index Rankings

Overall Rank	53/54
Wired Rank	49/54
Mobile Rank	51/54

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: NOT FREE in 2010**
- **Economist Intelligence Unit Instability: VERY HIGH RISK (7.8) in 2009/2010**
- Burma is a military dictatorship that denies basic human rights, Aung San Suu Kyi remains under house arrest and U.S. sanctions on Burma have been in force since July 2003.
- In August, Burma's military government announced that the country's first national elections in 20 years would be held on November 7, 2010. Under the 2008 constitution, one quarter of all parliamentary seats are reserved for military officials and a State Department spokesman has said that oppressive conditions prevent an inclusive and credible process. Aung San Suu Kyi's party has boycotted the election.
- Those who publicly express or disseminate views or images that are critical of the military government are subject to harsh punishments, including lengthy prison sentences, as well as assault and intimidation.
- Burma has received considerable political, technical and military support from China, whose interests in Burma have expanded dramatically in recent years. China broke ground in September 2010 on a major oil and gas pipeline linking the two countries.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (194/196) in 2010**
- **Reporters Without Borders Index: 102.67 (171/175) in 2009**
- All media in Burma are controlled and censored by the government. Burmese who openly express views critical of the military regime or possess materials deemed subversive have been arrested and imprisoned. People believed to hold these views are monitored and harassed.
- The government wants to discourage the use of individual satellite dishes and has set up pay-TV MRTV-4 International, which they can censor. A special digital receiver with a slot for a smart card is required, but no satellite dish. There are 13 international channels on MRTV-4 International; CNN International was removed by the authorities in early 2010.
- Access to the Internet is expensive, tightly regulated, and censored. Most international news websites are blocked. In the fall of 2007, the authorities closed down the Internet service providers to stop Internet traffic during major demonstrations.
- Burma has a long tradition of shortwave listening dating back to its days as a British colony. After years of extremely limited domestic radio coverage, Burmese authorities have begun to expand FM broadcasting aggressively, with plans for geographically dispersed stations to compete with popular international programming.
- Burma actively discourages the proliferation of mobile phones with extremely high prices and ownership is much lower than other parts of Southeast Asia. Still, a growing number of high-level elites have started using international cell phones in recent years.

PROFILE



Language of Broadcast: Cantonese

Content: 14hrs. of original radio programming per week; 0.2 hrs. of original and 0.25 hrs. of repeat TV programming per week; Internet

Distribution: 1 affiliate (TV); 1 IBB MW and 2 SW freqs.

TV: VOA Cantonese's program, *American Report*, is carried on ATV Hong Kong and AsiaSat3 for 5 minutes a week. ATV is one of two terrestrial broadcasters in Hong Kong and is available via satellite in parts of southern China.

Radio: VOA Cantonese has two radio affiliates in Hong Kong and two in Australia.

Web: The Service's programs are also available on the Internet, via podcasts and mobile phone applications.

Staff: 7

Budget: \$1,266,000

Established: 1941 to 1945; 1949 to 1963; 1987 to present



Language of Broadcast: Cantonese

Content: RFA broadcasts 7.5 hrs. of original and 6.5 hrs. of repeat radio programming per week; Internet

Distribution: 1-3 IBB SW frequencies; Satellite rebroadcasting for RFA programming

Staff: 7

Budget: \$1,070,000

Established: 1998 to present



PERFORMANCE DATA *

Audience Size

MILLIONS

Audience figures are based on surveys conducted in politically repressive environments that are generally hostile to international broadcasting. Because individuals in these countries are discouraged or even prohibited by their governments from listening to U.S. international broadcasts, actual audience numbers may be higher than those presented.

	Radio	Internet
VOA		
RFA		
USIB		

Weekly Reach by Media (%)

	VOA	RFA	USIB
Radio	na	na	na
TV	na	na	na
Internet	na	na	na
Total	na	na	na

Weekly Reach

%

No dedicated survey of Guangdong province has been conducted since October 2003. That survey estimated a weekly audience of 72,000. A new survey is planned for 2011.



Awareness (%)

VOA	RFA
10	4

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

	VOA	RFA
Radio	na	na
TV	na	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

	VOA	RFA
Current Events	na	na
U.S. Culture (VOA) or Current Events in Guangdong (RFA)	na	na
U.S. Policies	na	na

Quality

Combined Scores from audience panel

	VOA	RFA
Radio	3.4	3.1
TV	na	na

No dedicated survey of Guangdong Province has been conducted since October 2003.

*In the last dedicated survey of Guangdong Province in October 2003 total media reach figures were 0.1% for RFA and VOA in Cantonese; this projects to an estimated weekly audience of 72,000. In the last nationwide survey conducted in China (December, 2009), 2 respondents reported listening to VOA or RFA Cantonese in the past week; neither respondent was from Guangdong.

**Media use figures are for all of China and are taken from the December, 2009 nationwide survey.

Cantonese Broadcasting

A U D I E N C E C O M P O S I T I O N

Total Population of Guangdong: 72.4 million

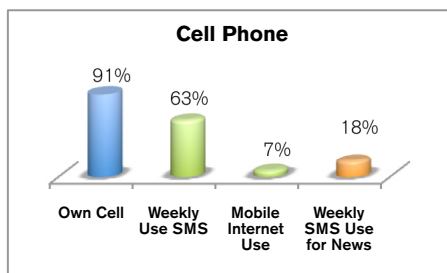
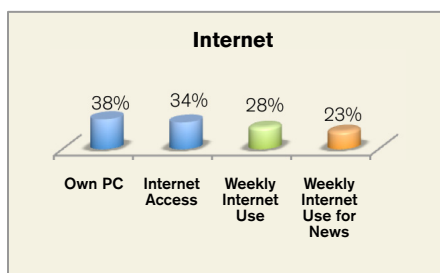
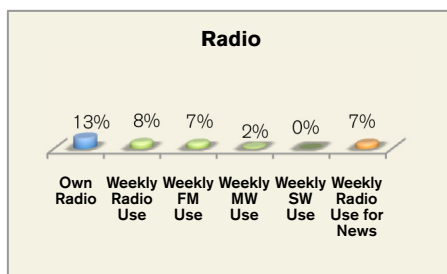
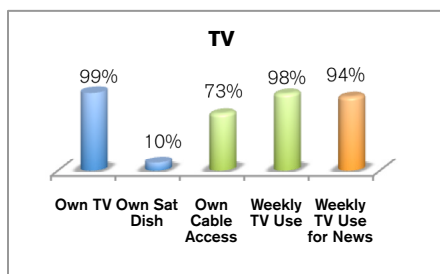
	Sam.*	VOA Weekly Aud.*	RFA Weekly Aud.*
Sex	%	%	%
Male	na	na	na
Female	na	na	na
Age			
15-24	na	na	na
25-34	na	na	na
35-44	na	na	na
45-54	na	na	na
55-64	na	na	na
65+	na	na	na

	Sam.*	VOA Weekly Aud.*	RFA Weekly Aud.*
Education	%	%	%
Primary or less	na	na	na
Jr. School	na	na	na
High School	na	na	na
Vocational			
Coll./Univ.	na	na	na
Ethnicity/Nationality			
Han	na	na	na
Other	na	na	na

	Sam.*	VOA Weekly Aud.*	RFA Weekly Aud.*
Residence	%	%	%
Urban	na	na	na
Rural	na	na	na
Language			
Mandarin	na	na	na
Cantonese	na	na	na
Other	na	na	na

*In the last dedicated survey of Guangdong Province in October 2003 total media reach figures were 0.1% for RFA and VOA in Cantonese; this projects to an estimated weekly audience of 72,000. In the last nationwide survey conducted in China (December, 2009), 2 respondents reported listening to VOA or RFA Cantonese in the past week; neither respondent was from Guangdong.

M E D I A U S E **



Top Ten Media Outlets**

1. CCTV1
2. CCTV News
3. CCTV2
4. CCTV4
5. Phoenix TV
6. Provincial Radio
7. Sina.com
8. Phoenix TV (Info)
9. Local Radio
10. Sohu.com

Top Ten Sources of News**

1. CCTV1
2. Provincial TV
3. Local TV
4. CCTV News
5. CCTV2
6. Local Press
7. CCTV4
8. CCTV12
9. CCTV5
10. Baidu.com

New Media Index Rankings (China)

Overall Rank	13/54
Wired Rank	11/54
Mobile Rank	25/54

Web Analytics

VOA Wkly. Visitors	na
Wkly. Visits	na
RFA Wkly. Visitors	3,694
Wkly. Visits	5,070

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: China—NOT FREE in 2010**
- **Economist Intelligence Unit Instability: China—MODERATE RISK (4.8) in 2009/2010**
- The southern Chinese provinces of Guangdong and Guangxi where most Cantonese speakers reside are relatively affluent provinces where many of China's major manufacturing and trading firms are based. These areas are relatively progressive and it is not surprising that high profile civil actions, such as recent Honda factory worker strikes, occur more frequently in these areas.
- With a huge internal migrant population, overcrowding in major cities and massive job creation requirements, internal stability is the Chinese government's primary political concern. China routinely subjugates human rights and legal protections under the banner of social stability.
- Despite such restrictions and occasional pushback against regime policy, the average standard of living in China has increased markedly since the beginning of reform in the late 1970's and studies, including the 2009 BBG survey, indicate most Chinese are satisfied with the state and direction of Chinese society.
- Citizens of the Cantonese speaking Special Administrative region of China, Hong Kong, enjoy considerably better political rights and civil liberties than do citizens of mainland China. In its 2010 report Freedom House classified Hong Kong as "Partly Free."

Media Environment

- **Freedom House Press Freedom Index: China—NOT FREE (181/196) in 2010**
- **Reporters Without Borders Index: China—84.50 (168/175) in 2009**
- China's media environment is evolving at an extremely rapid pace and the Cantonese-speaking areas of China are leading the way. Compared to the general population, a greater percentage of Cantonese speakers use the Internet and mobile phones. While new technologies are still most commonly used by young urbanites, they are rapidly being adopted in rural areas.
- Although it has been less the two years since the introduction of mobile 3G networks in China, 7 percent of Chinese access the Internet via mobile phone weekly, an increase from 5 percent in the 2008 survey. Mobile Internet access is not merely an urban phenomenon. In this year's survey, only 30 percent of mobile Internet users were urbanites, while 38 percent lived in rural villages. 3G mobile networks have allowed the Internet to penetrate into rural China even faster than the expansion of Internet infrastructure.
- Chinese are increasingly sophisticated in their online behavior. Blogs, podcasts, social networking sites and micro-blogs are becoming a normal part of many Chinese Internet users' online routines.
- All Cantonese media, traditionally the most progressive in the country, remain under the Central Government's strict control. Even the prominent Guangdong *Southern Weekend* journalist chosen by President Obama for the key interview of his December 2009 trip was demoted later for his handling of the interview. Guangdong's very active bloggers and social networkers continue to test the limits by exposing local problems and mobilizing support. However, authorities use frequent administrative detentions, which do not require formal charges, to thwart new media activities.
- In July 2010, a government official's suggestion that Cantonese language be eliminated from television broadcasts in Guangdong sparked protests that clogged the streets in Guangzhou (Canton) and Hong Kong and led to a revival of cultural identification among young Cantonese. Activists tapped into web-based social networks and cell phone networks to coordinate the protests.

PROFILE



Language of Broadcast: Kinyarwanda & Kirundi

Content: 7 hrs. of original radio programming per week; Internet

Distribution: 3 affiliates (3 FM), 3 SW frequencies, 1 IBB FM in Kigali

In addition to its shortwave broadcasts, VOA's Central Africa Service programs are simulcast on the VOA 24-hour FM frequency in Kigali, Rwanda. All programs, broadcast in Kirundi and Kinyarwanda, are also simulcast on FM by VOA affiliate stations in Burundi and Rwanda, and they are on medium wave on Radio Free Africa located in Mwanza, Tanzania.

Staff: 9

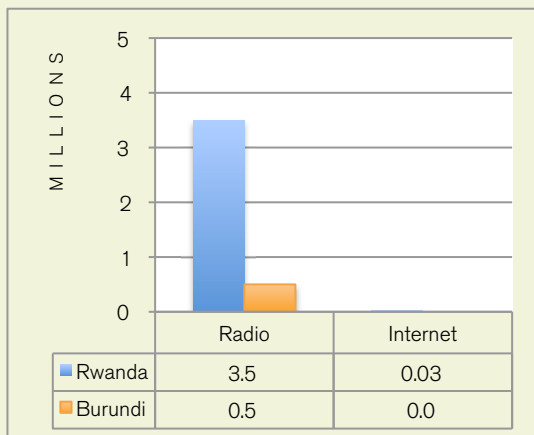
Budget: \$1,319,000

Established: 1996 to present



PERFORMANCE DATA (Using Data from Burundi March, 2010 & Rwanda October, 2008)

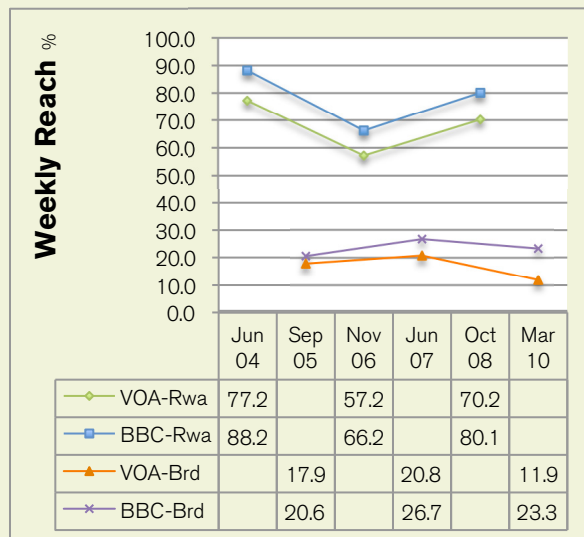
Audience Size



Weekly Reach by Media (%)

	Rwanda	Burundi
Radio	70.2	11.9
TV	na	na
Internet	0.5	< .1
Total	70.2	11.9

Weekly Reach %



Awareness (%)

	Rwanda	Burundi
	95	40

Credibility

	Rwanda	Burundi
Radio	95	80
TV	na	na

Understanding

	Rwanda	Burundi
Current Events	65	79
U.S. Culture	33	36
U.S. Policies	33	46

Quality

	Rwanda	Burundi
Radio	3.3	3.3
TV	na	na

Data are from a March 2010 nationwide survey of adults (15+) in Burundi and an October, 2008 nationwide survey of adults (15+) in Rwanda.

Kinyarwanda & Kirundi Broadcasting

A U D I E N C E C O M P O S I T I O N Total Population of Burundi 8.5 M and Rwanda 10.4 M

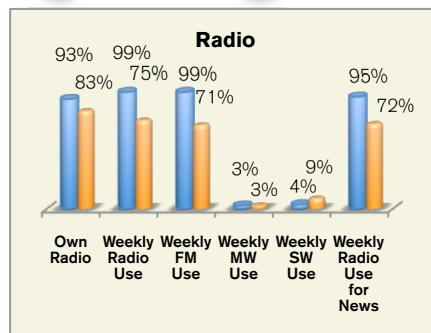
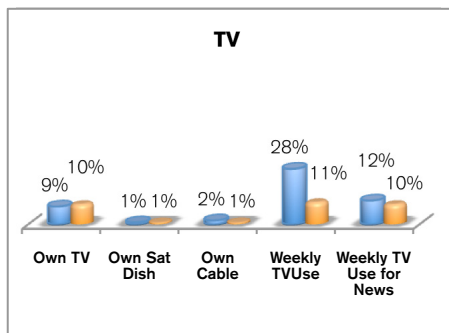
	Rwd. Sam.	Rwd. Wkly. Aud.	Bur. Sam.	Bur. Wkly. Aud.
Sex	%	%	%	%
Male	48	47	49	73
Female	52	53	51	27
Age				
15-24	35	34	30	17
25-34	26	26	28	33
35-44	14	15	20	34
45-54	12	12	12	12
55-64	7	7	6	4
65+	3	3	5	1

	Rwd. Sam.	Rwd. Wkly. Aud.	Bur. Sam.	Bur. Wkly. Aud.
Educ	%	%	%	%
None	25	25	16	3
Primary	64	62	39	20
Sec.	7	6	33	47
Higher	4	7	10	27
Ethnicity/Nationality				
Burundian	na	na	98	96
Other	na	na	2	4

	Rwd. Sam.	Rwanda Wkly. Aud.	Bur. Sam.	Burundi Wkly. Aud.
Residence	%	%	%	%
Urban	17	16	12	21
Semi-urb.	na	na	81	13
Rural	83	84	7	66
Language Spoken at Home				
Kinyar.	99	99	<1	0
Kirundi	0	0	97	96
Swahili	<1	<1	1	2
Other	<1	<1	2	2

M E D I A U S E

 Rwanda  Burundi

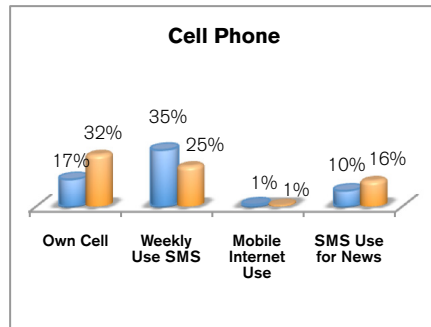
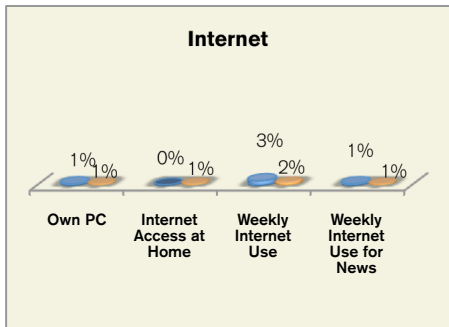


Top Ten Sources of News (Rwanda)

1. Radio Rwanda
2. VOA
3. Radio Imani
4. Radio Salus
5. Televisiyo Rwanda
6. Radio Izuba
7. Radio 10
8. Contact FM
9. Imvaho Nshya
10. Radio Gisenyi

Top Ten Sources of News (Burundi)

1. RTN Burundi
2. Bonesha FM
3. Radio Public Africaine
4. Radio Isanganiro
5. BBC
6. RTNB
7. Radio Kwizera
8. Radio Ava Maria
9. VOA
10. Radio BINUB



New Media Index Rankings (Rwanda)

Overall Rank 46/54
Wired Rank 52/54
Mobile Rank 38/54

Web Analytics

Weekly Visitors 2,568
Weekly Visits 10,568

C O N T E X T

↓ **Stability** ↓ **Political Freedom** ↓ **Press Freedom** ↓ **Ease of Distribution** ↓ **Competition**

Political Situation

- **Freedom House Political Freedom Index:** Rwanda—NOT FREE; Burundi—PARTLY FREE in 2010
- **Economist Intelligence Unit Instability:** Rwanda—MODERATE RISK (4.9); Burundi—HIGH RISK (6.9)
- As Burundi continues to recover from years of civil war and unrest, local elections in May 2010 and a presidential elections in late June 2010 have offered only limited signs of progress. There were accusations of fraud and political violence surrounding the local polls in May, and the incumbent president ran for reelection unopposed.
- Despite its uncertain future, the peace building process has been moving forward, with support from the UN, South Africa, other regional bodies, and international donors.

Media Environment

- **Freedom House Press Freedom Index:** Rwanda—NOT FREE (178/196); Burundi—NOT FREE (159/196) in 2010
- **Reporters Without Borders Index:** Rwanda—64.67 (157/175); Burundi—29.00 (103/175) in 2009
- Historically, domestic media has been subject to government controls, directly or through more subtle means, and many Burundians turn to international radio for domestic news.
- Radio dominates the media market, as television ownership is very low, particularly outside of urban areas. Mobile phone ownership has increased rapidly, though the use of mobile phones for news and information gathering is still limited. Very few Burundians use the Internet regularly, or have access to it at all.



PROFILE



Language of Broadcast: Creole

Content: 9.5 hrs. of original radio programming per week; Internet

Distribution: 13 affiliates (13 FM)

VOA Creole broadcasts to Haiti via 13 local FM affiliate stations throughout the country. The lead affiliate, Radio Ginen, covers most regions in the country and has been ranked number 1 among the most popular stations, according to survey data. The service also delivers news and information on its website and on social media platforms Twitter, Facebook, and YouTube.

Staff: 10

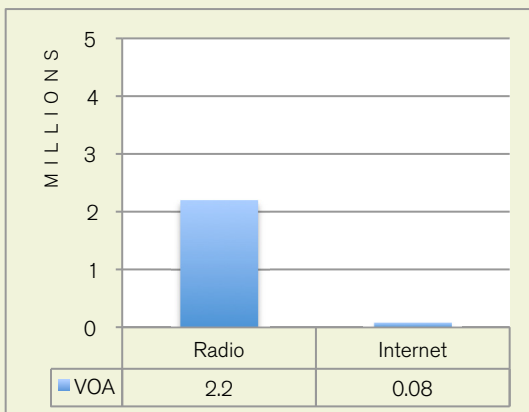
Budget: \$1,174,000

Established: 1987 to present



PERFORMANCE DATA (Using Data from Haiti, June 2009)

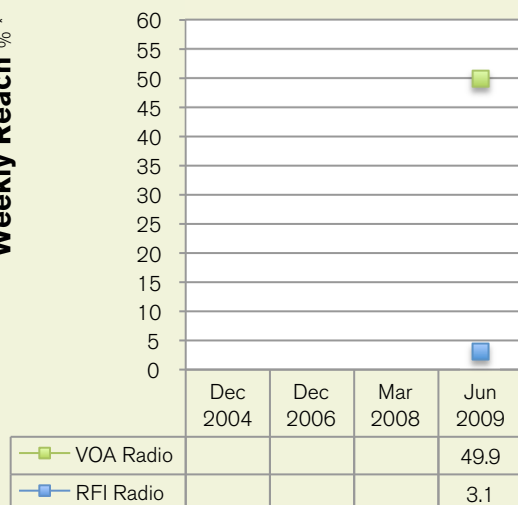
Audience Size



Weekly Reach (%) by Media

VOA	
Radio	49.8
TV	na
Internet	1.8
Total	49.9

Weekly Reach % *



Awareness (%)

VOA	
	60

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

VOA	
Radio	95
TV	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

VOA	
Current Events	79
U.S. Culture	70
U.S. Policies	52

Quality

Combined Scores from audience panel

VOA	
Radio	3.4
TV	na

*Due to differences in sample coverage between the June 2009 nationwide survey and previous urban-only surveys conducted in Haiti, it is not possible to show trend data.

Data are from a June 2009 nationwide survey of adults (18+) in Haiti.

Creole Broadcasting

Total Population of Haiti: 9.8 million

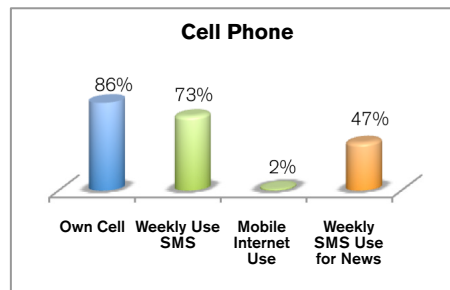
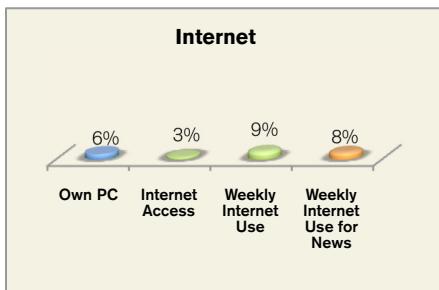
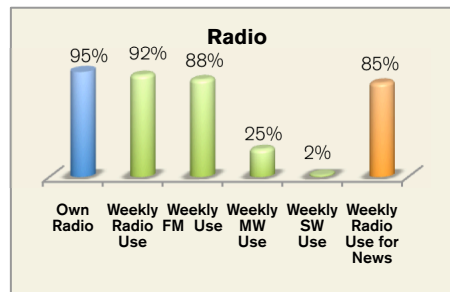
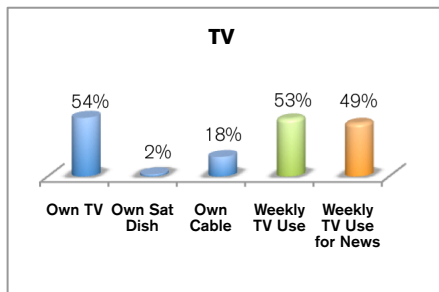
A U D I E N C E C O M P O S I T I O N

	Sample	VOA Weekly Audience
Sex	%	%
Male	47	52
Female	53	48
Age		
15-24	20	19
25-34	33	36
35-44	17	19
45-54	19	17
55-64	7	5
65+	4	4

	Sample	VOA Weekly Audience
Education	%	%
None/Primary	5	4
Inc. Secondary	32	29
Technical/Secondary	47	50
Higher	11	15
Ethnicity/Nationality		
na		

	Sample	VOA Weekly Audience
Residence	%	%
Urban	42	46
Rural	58	54
Language		
Creole	97	97
French	2	2
Other	1	1

M E D I A U S E



Top Ten Media Outlets

1. Tele Edair Canal 4
2. Radio Caraibes
3. Tele Caraibes
4. VOA Creole
5. Tele Nationale d'Haiti
6. Tele Ginen
7. Raio Lumiere
8. Radio Ginen
9. Telemax Canal 5
10. Panel Krevol

Top Ten Sources of News

1. Radio Ginen
2. Radio Nationale d'Haiti
3. Tele Nationale d'Haiti
4. Radio Lumiere
5. R. Vision 2000
6. Novellistes
7. Tele Ginen
8. Tele Caraibes
9. Tele Cap Haitien
10. Radio Metropole

New Media Index Rankings

Overall Rank	29/54
Wired Rank	38/54
Mobile Rank	7/54

Web Analytics

Weekly Visitors	741
Weekly Visits	3,546

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: PARTLY FREE in 2010**
- **Economist Intelligence Unit Instability: VERY HIGH RISK (7.8) in 2009/2010**
- Haiti is still one of the poorest countries in the Western hemisphere. Poverty, unemployment, social inequality, illiteracy, kidnappings, drug trafficking and corruption are some of the problems that Haitians face every day. This situation has prompted many Haitians to emigrate to the Dominican Republic and the U.S. Their remittances to families in Haiti account for 35 percent of the country's GDP.
- Early this year, Haiti was hit by a magnitude 7 earthquake killing tens of thousands. Haiti is in the process of recovering from this natural disaster; however the lack of economic resources is delaying this process. The media has been directly affected; problems include poor regional coverage, lack of TV sets in households (54 percent), and a lack of electricity.

Media Environment

- **Freedom House Press Freedom Index: PARTLY FREE (100/196) in 2010**
- **Reporters Without Borders Index: 15.00 (57/175) in 2009**
- Although threats and attacks on journalists have decreased since early 2008, the absence of an effective and reliable judicial system has forced many media outlets to opt for self-censorship to avoid repercussions.
- Radio is the most popular medium and the most important source of information. Haiti has one of the lowest Internet penetration rates in the region, although very high cell phone ownership.
- VOA is the leading international broadcaster in Haiti with a general awareness of 60 percent and a weekly reach of 50 percent. RFI has just over one-fourth the weekly reach of VOA. VOA affiliate outlets are the most-listened to radio stations in Haiti. About one-quarter of VOA annual listeners listen to VOA daily and around half of them listen to VOA several times per week.



PROFILE



Language of Broadcast: Croatian

Content: 5.25 hrs. of original radio programming per week; 0.5 hrs. of original and 0.5 hrs. of repeat TV programming per week; Internet

Distribution: Distribution: 18 affiliates (8 TV and 10 radio)

TV: VOA Croatian broadcasts 35 minutes of television per week. Its daily five minute program, *NewsFlash*, is carried by 8 affiliate stations that cover all of Croatia's major regions and the capital, Zagreb.

Radio: VOA's 5 hours and 15 minutes of live weekly programming is carried by 7 FM affiliates in Croatia and 3 affiliates in Bosnia.

Web: The Croatian Service maintains an up-to-date website, provides updates on Twitter and Facebook and provides video on YouTube.

Staff: 6

Budget: \$944,000

Established: 1943 to present



PERFORMANCE DATA* (Latest Data from Croatia, March 2005)

Audience Size

MILLIONS

Current audience data from Croatia does not exist. A survey in 2005 indicated a VOA total media weekly reach figure of 4.9%.

	Radio	Internet
VOA		

Weekly Reach (%) by Media

VOA	
Radio	na
TV	na
Internet	na
Total	na

Weekly Reach %

Current audience data from Croatia does not exist. A survey in 2005 indicated a VOA total media weekly reach figure of 4.9%.

VOA	Jun 2005
-----	----------

Awareness (%)

VOA	
	12

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

VOA	
Radio	na
TV	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

VOA	
Current Events	na
U.S. Culture	na
U.S. Policies	na

Quality

Combined Scores from audience panel

VOA	
Radio	3.4
TV	na

*The last available survey indicated a total media weekly reach figure of 4.9% (2.0% for radio and 3.0% for TV) for the VOA Croatian service in Croatia.

No quantitative research has been conducted for the VOA Croatian service since a March 2005 nationwide survey of adults (15+) in Croatia.

Croatian Broadcasting

Total Population of Croatia: 4.4 million

A U D I E N C E C O M P O S I T I O N

	Sample*	VOA Weekly Audience*
	na	na
Sex	%	%
Male	na	na
Female	na	na
Age		
15-24	na	na
25-34	na	na
35-44	na	na
45-54	na	na
55-64	na	na
65+	na	na

	Sample*	VOA Weekly Audience*
Education	%	%
Primary or less	na	na
Junior School	na	na
High School	na	na
Vocational		
Coll./Univ.	na	na
Ethnicity/Nationality		
Croatian	na	na
Other	na	na

	Sample*	VOA Weekly Audience*
Residence	%	%
Urban	na	na
Rural	na	na
Language		
Croatian	na	na
Other	na	na

*The last available survey indicated a total media weekly reach figure of 4.9% (2.0% for radio and 3.0% for TV) for the VOA Croatian service in Croatia.

M E D I A U S E

TV
Media use data is not available.

Radio
Media use data is not available.

New Media Index Rankings

Overall Rank	na/54
Wired Rank	na/54
Mobile Rank	na/54

Web Analytics

Weekly Visitors	3,187
Weekly Visits	5,027

Internet
Media use data is not available.

Cell Phone
Media use data is not available.

C O N T E X T

↓ **Stability**

↑ **Political Freedom**

↑ **Press Freedom**

↑ **Ease of Distribution**

↑ **Competition**

Political Situation

- **Freedom House Political Freedom Index: FREE in 2010**
- **Economist Intelligence Unit Instability: HIGH RISK (6.1) in 2009/2010**
- Following the resolution of a border dispute with Slovenia, Croatia has resumed talks with the EU and hopes to become a full-fledged member by 2012. However, the EU has warned the country that it should do more to tackle organized crime and corruption to qualify for membership.
- In addition, Croatia has been urged to step up the level of cooperation with the International Criminal Tribunal for the former Yugoslavia, which is key for concluding the EU entry talks.
- Over the past year, economic growth in Croatia has slowed down, and Croatia is now the only southeastern Europe country that will not register at least slight economic growth in 2010, according to the Vienna Institute for International Economic Studies.
- The opposition has been calling for early elections over what it describes as the government's inability to handle public finances and lead the country out of the present recession.

Media Environment

- **Freedom House Press Freedom Index: PARTLY FREE (85/196) in 2010**
- **Reporters Without Borders Index: 17.17 (78/175) in 2009**
- Public TV is the main source of news and information, and it competes with dozens of commercial networks for viewers. Croatia also has IPTV and hopes to complete a transition to digital TV broadcasting by January 2011.
- A new broadcast law, adopted in December 2009, is expected to improve the transparency of frequency allocation, which has been a major concern in the past.
- The public broadcaster, HRT, is financed by advertising and a licensing fee, and it is considered free of political influence and bias. However, most local media are still financed by the municipal authorities and are, consequently, subject to constant threats to their editorial independence.
- As in other countries in the region, investigative reporting is discouraged and self-censorship does occur.

PROFILE



Language of Broadcast: Dari

Content: 84 hrs. of original radio programming per week; 6 hrs. of original TV programming per week; Internet

Distribution: 7 affiliates (5 FM, 1 MW, 1 TV), 2 or 3 IBB SW frequencies

VOA delivers radio programming, seven days per week, on FM, AM, and IBB shortwave. The FM is broadcast to Kabul, Herat, Kandahar, Mazar-e-Sharif, and Jalalabad. IBB shortwave is heard in Afghanistan, Pakistan, Iran, Tajikistan and Uzbekistan.

VOA's Afghan news program, *TV Ashna*, is televised live throughout Afghanistan on RTA, Afghanistan's state-owned television network. The first half hour is in Dari; the second in Pashto.

Staff: 22

Budget: \$3,721,000

Established: 1980 to present



Language of Broadcast: Dari

Content: 42 hrs. of original radio programming per week; Internet

Distribution: Delivery includes 1 national MW, 8 IBB FM transmitters, multiple SW frequencies, HotBird, AsiaSat, Yamal and Internet with streaming audio (Dari site plus Pashto site).

Staff: 30

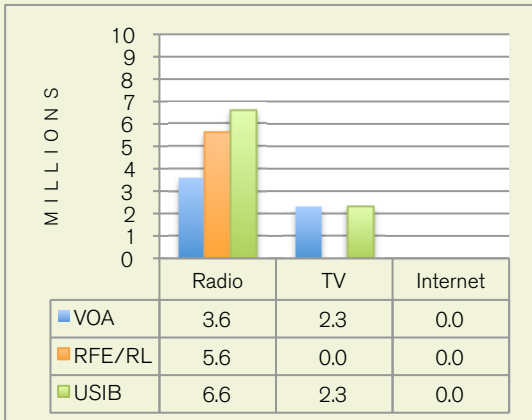
Budget: \$11,236,000

Established: 1985-1993; 2002 to present



PERFORMANCE DATA (Using Data from Afghanistan, November 2009)

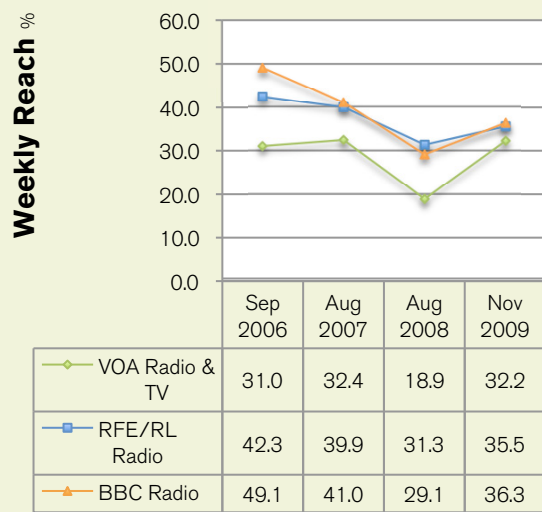
Audience Size



Weekly Reach by Media (%)

	VOA	RFE/RL	USIB
Radio	22.4	35.5	41.2
TV	14.3*	na	14.3*
Internet	< .1	< .1	< .1
Total	32.2	35.5	48.0

Weekly Reach



Awareness (%)

VOA	RFE/RL
56	71

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

	VOA	RFE/RL
Radio	88	88
TV	95	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

	VOA Radio*	RFE/RL
Current Events	88	89
U.S. Culture (VOA) or Current Events in Afghanistan (RFE/RL)	68	90
U.S. Policies	54	na

Quality

Combined Scores from audience panel

	VOA	RFE/RL
Radio	3.3	3.4
TV	na	na

*Viewing in "Dari only" or "Dari and Pashto"

**Understanding ratings for VOA TV are 99% for Current Events, 77% for U.S. Culture and 67% for U.S. Policies.

Data are from a November 2009 nationwide survey of adults (15+) in Afghanistan.

Dari Broadcasting

A U D I E N C E C O M P O S I T I O N

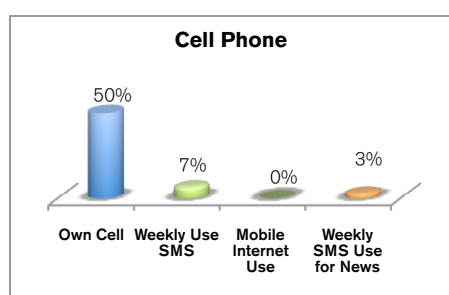
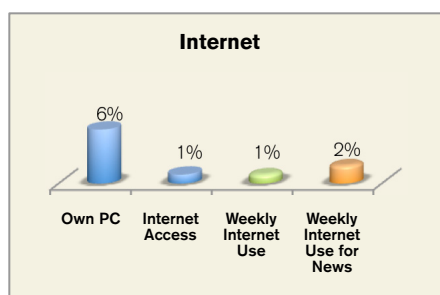
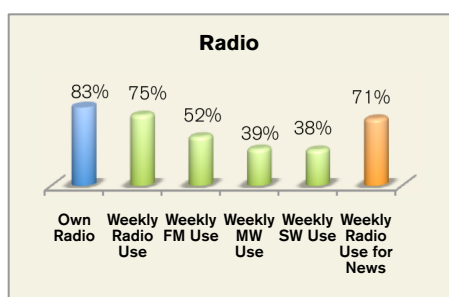
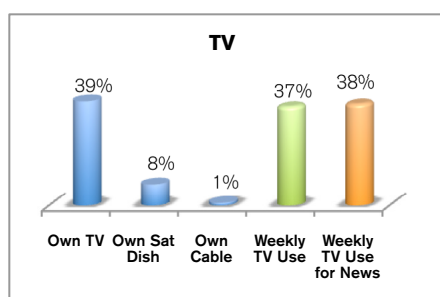
Total Population of Afghanistan: 28.4 million

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
Sex	%	%	%
Male	55	61	61
Female	45	39	39
Age			
15-24	32	33	32
25-34	25	26	25
35-44	22	22	22
45-54	11	11	12
55-64	6	6	5
65+	3	3	3

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
Education	%	%	%
illiterate/No Formal	61	53	54
Elem./Inter.	19	21	20
Secondary	16	21	18
Coll./Univ.	3	5	6
Ethnicity/Nationality			
Pashtun	40	27	31
Tajik	31	44	39
Uzbek	11	13	15
Other	18	16	15

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
Residence	%	%	%
Urban	21	35	30
Rural	79	65	70
Language			
Dari	50	65	56
Pashto	37	22	28
Uzbek	11	12	15
Other	2	1	1

M E D I A U S E



Top Ten Media Outlets

1. Tolo TV
2. Ariana TV
3. Radio Afghanistan
4. TV Afghanistan
5. Radio Arman
6. Ariana Radio
7. Lemar TV
8. Shamshad TV
9. Afghan TV
10. VOA TV

Top Ten Sources of News

1. RFE/RL
2. BBC
3. Tolo TV
4. VOA
5. Radio Afghanistan
6. TV Afghanistan
7. Ariana TV
8. Radio Arman
9. Ariana TV
10. Lemar TV

New Media Index Rankings

Overall Rank	48/54
Wired Rank	49/54
Mobile Rank	43/54

Web Analytics

VOA Weekly Visitors	3,425
Weekly Visits	12,920
RFE/RL Weekly Visitors	7,429
Weekly Visits	24,691

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: NOT FREE in 2010**
- **Economist Intelligence Unit Instability: VERY HIGH RISK (7.8) in 2009/2010**
- One year before the planned beginning of withdrawal of US and NATO troops, the security situation has not improved in Afghanistan.
- Additionally, Karzai's government, on which the American administration had counted to help stabilize the security situation, has been ineffective and has garnered little trust among Afghans.
- In August 2010, eight foreign aid workers were killed in Badakshshan Province, and September saw an increase in violence leading up to parliamentary elections, which were marred by claims of widespread fraud.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (165/196) in 2010**
- **Reporters Without Borders Index: 54.25 (149/175) in 2009**
- National data above should be considered in light of the fact that media use in Afghanistan differs radically among ethno-linguistic groups. Those who speak Dari at home, for example, are nearly twice as likely to use TV for news everyday than are Pashto speakers. They are less than half as likely as Pashto speakers to listen to radio for news, including international radio.
- Although awash in foreign money, Afghanistan is still very much a developing country when it comes to ICT infrastructure. The internet is nascent, and mobile phones are used mostly for voice.
- 2009 was a difficult year for journalists in Afghanistan, who faced violence and threats from the Taliban, other militant groups and warlords, as well as the government around the time of the August 2009 elections.
- In March 2009, an Afghan journalist was fatally beaten in Kandahar. Two reporters working for foreign press were also killed in 2009.



Broadcasting
Board of
Governors

PROFILE



Voice of America®



Language of Broadcast: English

Content: 94.25 hrs. of original radio programming per week; 4 hrs. of original TV programming per week; Internet

Distribution: 57 affiliates (55 FM, 1 Cable Radio, 1 Cable TV); 25 IBB FM, 5 MW, and 1-6 SW frequencies

Radio: 91 hours of original news and information programming that is targeted to Africa -- *Daybreak Africa*, *Nightline Africa* and *Sudan In Focus*; *Africa Music Mix*, 36 hours per week via satellite to 17 affiliates. Also, current affairs programming which includes *Press Conference*, *USA* interviews about critical issues; *Encounter*, panel discussion, and *Issues in the News*, correspondents' discussion.

TV: VOA's programming includes *In Focus*, a 30-minute news magazine, and *Straight Talk Africa*, a weekly call-in program that features prominent African guests. The English Service also produces, *On the Line*, an interview program dealing with current events.

Staff: 16

Budget: \$3,050,000

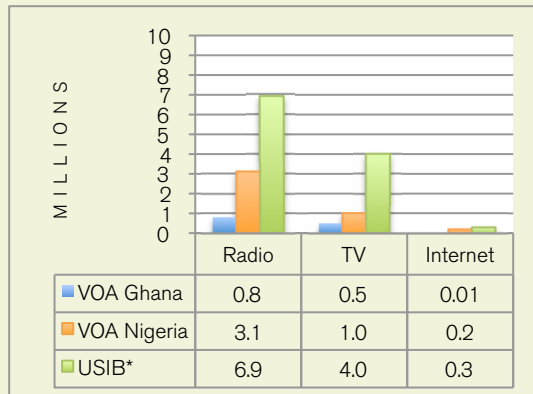
Established: 1942 to present



PERFORMANCE DATA

(Using Data from Ghana, Jun '08 and Nigeria, Oct '09)

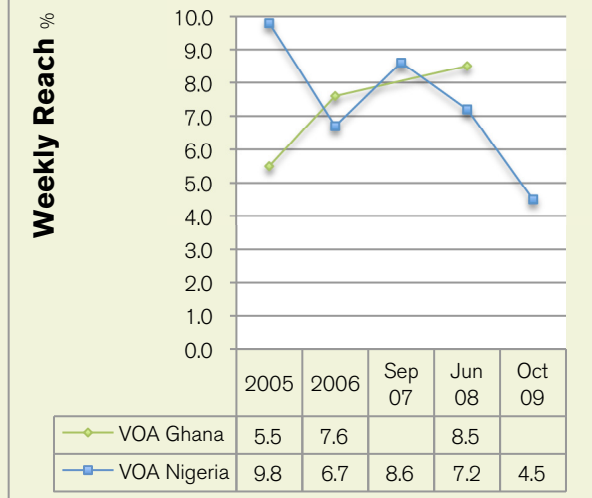
Audience Size



Weekly Reach (%) by Media

	VOA Ghana	VOA Nigeria
Radio	5.6	3.7
TV	3.8	1.2
Internet	0.1	0.2
Total	8.5	4.5

Weekly Reach %



Awareness (%)

VOA Ghana	VOA Nigeria
29	54

Credibility

Percentage of surveyed weekly audience that found broadcasts credible (%)

	VOA Ghana	VOA Nigeria
Radio	99	98
TV	100	100

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

	VOA Ghana Radio**	VOA Nigeria Radio**
Current Events	85	90
U.S. Culture	53	84
U.S. Policies	83	72

Quality

Combined Scores from audience panel

	VOA
Radio	3.3
TV	3.3

Data are from an October 2009 survey of adults (15+) in Nigeria and a June, 2008 survey of adults (15+) in Ghana..

*USIB audience estimate is based on data from Burundi, Ethiopia, Ghana, Guinea, Kenya, Niger, Nigeria, Rwanda, Somalia (Mogadishu only), Tanzania, Uganda and Zimbabwe.

**In Ghana, understanding ratings for VOA English to Africa TV are: 66% for Current Events; 73% for U.S. Culture; and 65% for U.S. Policies. In Nigeria, understanding ratings for VOA English to Africa TV are: 95% for Current Events; 95% for U.S. Culture; and 80% for U.S. Policies..

***Refer to the Hausa page for media use and context information for Nigeria.

English to Africa Broadcasting

A U D I E N C E C O M P O S I T I O N

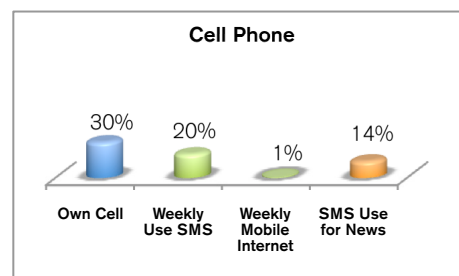
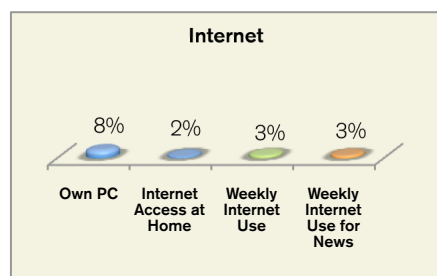
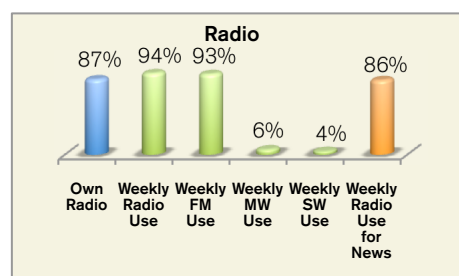
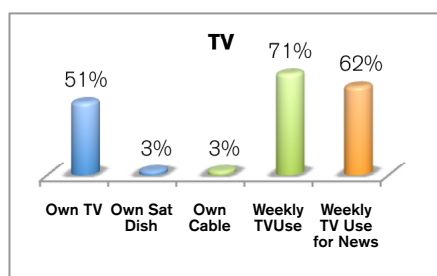
Total Population of Ghana 23.8 million and Nigeria 158.3 million

	VOA Ghana Sample	VOA Ghana Weekly Aud.	VOA Nigeria Sample	VOA Nigeria Weekly Aud.
Sex	%	%	%	%
Male	49	73	49	78
Female	51	27	51	22
Age				
15-24	31	39	29	40
25-34	23	22	30	28
35-44	19	18	18	16
45-54	17	11	13	13
55-64	10	8	7	4
65+	na	na	3	0

	VOA Ghana Sample	VOA Ghana Wkly. Aud.	VOA Nigeria Sample	VOA Nigeria Weekly Aud.
Education	%	%	%	%
No Formal	19	10	41	7
Primary	55	49	21	14
Sec/Voc.	24	37	30	45
Coll./Univ.	1	4	8	33
Ethnicity/Nationality				
Twi	38	27	na	na
Ewe	13	12	na	na
Hausa	na	na	42	22
Yoruba	na	na	22	13
Other	49	61	36	65

	VOA Ghana Sample	VOA Ghana Weekly Aud.	VOA Nigeria Sample	VOA Nigeria Weekly Aud.
Residence	%	%	%	%
Urban	45	66	30	39
Semi-urban	na	na	10	22
Rural	55	34	60	39
Language Spoken At Home				
Twi	43	34	na	na
Ewe	11	8	na	na
Hausa	na	na	49	33
Yoruba	na	na	21	11
English	2	4	<1	1
Other	44	52	30	54

M E D I A U S E *** (Ghana)



Ghana Top Ten Sources of News

1. GTV
2. TV3
3. Peace FM 104.3
4. Adom FM 106.3
5. Metro TV
6. Nhyira FM
7. Obourba FM
8. Hello FM 102.1
9. Fox FM 97.9
10. Radio Savannah

Nigeria Top Ten Sources of News

1. NTA
2. BBC
3. VOA
4. FM Kano
5. Radio Jigawa
6. Osun Radio
7. Freedom FM
8. DW
9. KBC Kano
10. ABC I Yola

New Media Index Rankings

Ghana

Overall Rank 44/54
Wired Rank 42/54
Mobile Rank 48/54

Nigeria

Overall Rank 39/54
Wired Rank 44/54
Mobile Rank 18/54

Web Analytics

Weekly

Visitors 467,152†

Weekly

Visits 802,718†

†Worldwide English totals.

C O N T E X T ***



Stability



Political Freedom



Press Freedom



Ease of Distribution



Competition

Political Situation

- **Freedom House Political Freedom Index:** Ghana—FREE in 2009
- **Economist Intelligence Unit Instability:** Ghana—HIGH RISK (5.9) in 2009
- A peaceful transition of power between the major political parties after Presidential elections in 2008 confirmed Ghana's reputation as a stable democracy.
- The country's track record on human rights and good governance are held up as a model amidst its less stable West African neighbors. Economic and political institutions will be tested in the coming years, however, as the country begins earning revenue from offshore oil deposits discovered in 2007.

Media Environment

- **Freedom House Press Freedom Index:** Ghana—FREE (55/196); Nigeria—PARTLY FREE (110/196) in 2010
- **Reporters Without Borders Index:** Ghana—6.00 (27/175) in 2009
- Ghana's media environment is considered one of the freest in Africa, with private newspapers, radio and TV stations competing freely with the state-sponsored Ghana Broadcasting Corporation.
- Radio remains the most accessible and widely used media platform, though a majority of Ghanaians also watch TV at least weekly for news and information.
- Mobile phones are becoming more widely accessible, even in rural areas, but Internet access remains extremely limited. Predictably, Internet use is higher in urban than rural areas, as well as among youth.
- Media research capacity in West Africa has improved substantially over the last several years, and a number of international market research firms now have affiliate groups or offices in West Africa.

PROFILE



Language of Broadcast: English

Content: 14 hrs. of original radio programming per week; Internet

Distribution: 31 radio affiliates; radio is on SW and MW; Satellite

Radio: The English Division has just begun regionalizing programming to Asia; *Daybreak Asia* (morning) and *Crossroads Asia* (evening) deliver targeted news and information; *International Edition* contains world news.

TV: The English Service produces *On the Line*, an interview program dealing with current events.

Digital distribution: Includes articles, photos, video, audio, and other multimedia forms such as flash. Platforms include voanews.com, Facebook, Twitter, mobile and limited SMS. The English website has the largest audience of any of VOA's services.

Staff: 100†

Budget: \$16,173,000†

Established: 1942 to present

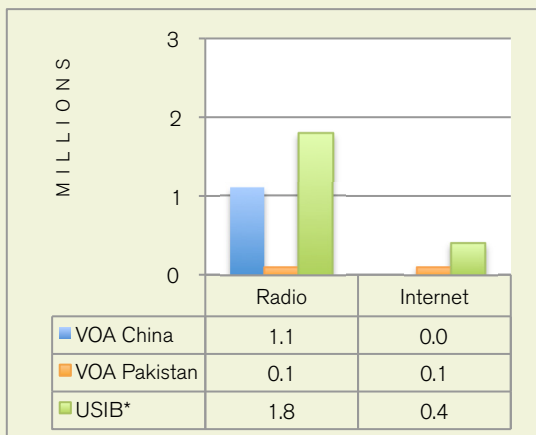
† Includes all non-African English worldwide.



PERFORMANCE DATA

(Using Data from China, Dec. 2009 and Pakistan, Aug. 2009)

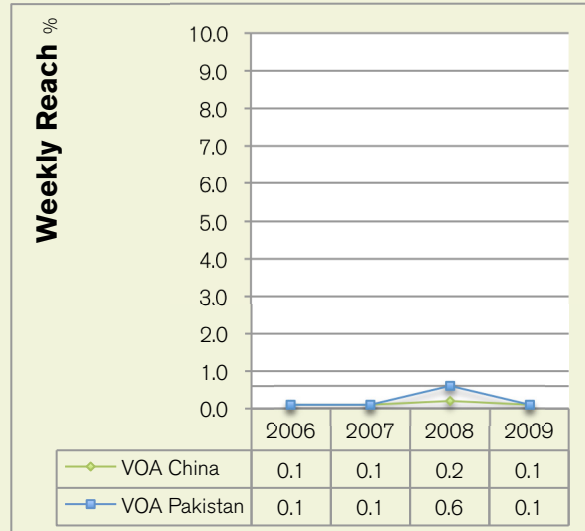
Audience Size



Weekly Reach (%) by Media

	VOA China	VOA Pakistan
Radio	0.1	0.1
TV	na	na
Internet	< .1	0.1
Total	0.1	0.1

Weekly Reach %



Awareness (%)

	VOA China	VOA Pakistan
	12	12

Credibility

Percentage of surveyed weekly audience that found broadcasts credible (%)

	VOA China	VOA Pakistan
Radio	na	na
TV	na	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

	VOA China	VOA Pakistan
Current Events	na	na
U.S. Culture	na	na
U.S. Policies	na	na

Quality

Combined Scores from audience panel

	VOA China	VOA Pakistan
Radio	na	na
TV	na	na

Data are from nationwide surveys of adults (15+) in China (December 2009) and Pakistan, excluding FATA (August 2009).

* USIB audience estimate is based on data from Afghanistan, Bangladesh, Burma, Cambodia, China, India ("Hindi Belt" only), Indonesia, Kazakhstan, Kyrgyzstan, urban Laos, Pakistan (excluding FATA), Tajikistan, Uzbekistan and Vietnam (8 regions with the 30 most important urban centers, including rural areas). In addition, the May 2008 survey of "Hindi Belt" India indicated a weekly TV audience for VOA English or approximately 0.3 million.

**Sample of VOA English weekly listeners is too small for meaningful analysis.

English to Asia Broadcasting

A U D I E N C E C O M P O S I T I O N

Total Population of China 1,338.1 million and Pakistan 184.8 million

	China Sam.	VOA China**	Pak. Sam.	VOA Pak.**
Sex	%	%	%	%
Male	50	na	49	na
Female	50	na	51	na
Age				
15-24	17	na	29	na
25-34	21	na	29	na
35-44	25	na	22	na
45-54	22	na	12	na
55-64	12	na	5	na
65+	16	na	3	na

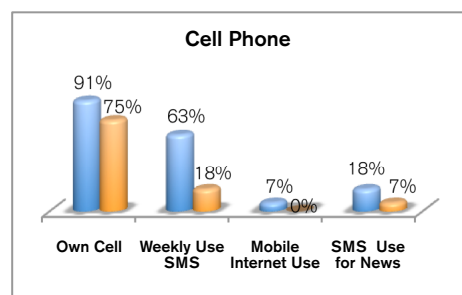
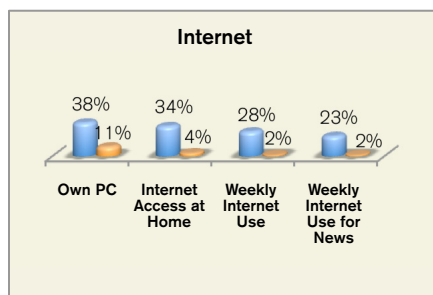
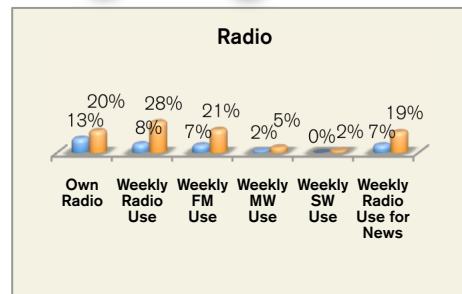
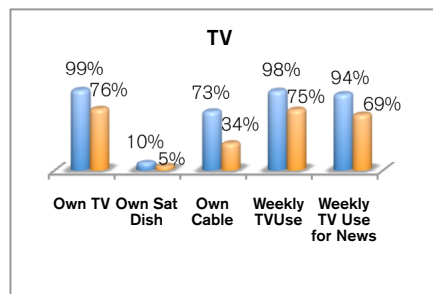
	China Sam.	VOA China**	Pak. Sam.	VOA Pak.**
Education	%	%	%	%
No formal	na	na	36	na
None/Pri.	22	na	na	na
Elem.	na	na	6	na
Junior	40	na	na	na
Sec.	34	na	50	na
Coll/Univ	3	na	7	na
Ethnicity/Nationality				
Han	99	na	na	na
Other	1	na	na	na

	China Sam.	VOA China**	Pak. Sam.	VOA Pak.**
Residence	%	%	%	%
Urban	45	na	35	na
Rural	55	na	65	na
Language Spoken At Home				
Mandarin	14	na	na	na
Punjabi	na	na	40	na
Sariki	na	na	16	na
Urdu	na	na	13	na
Pashto	na	na	12	na
Sindi	na	na	11	na
Other	86	na	8	na

**Sample of VOA English weekly listeners is too small for meaningful analysis.

M E D I A U S E

China Pakistan



China Top Ten Sources of News

1. CCTV1
2. Provincial TV
3. Local TV
4. CCTV News
5. CCTV2
6. Local Press
7. CCTV4
8. CCTV12
9. CCTV5
10. Baidu.com

Pakistan Top Ten Sources of News

1. GEO News
2. PTV1
3. Express News
4. PTV World/11
5. Jang
6. ATV
7. KTN
8. Aaj TV
9. GEO TV
10. Kawish

New Media Index Rankings

China

Overall Rank 13/54
Wired Rank 11/54
Mobile Rank 25/54

Pakistan

Overall Rank 40/54
Wired Rank 34/54
Mobile Rank 43/54

Web Analytics

Weekly Visitors 467,152+
Weekly Visits 802,718+
 †Worldwide English totals.

C O N T E X T

↓ Stability ↓ Political Freedom ↓ Press Freedom ↓ Ease of Distribution ↑ Competition

Political Situation

- **Freedom House Political Freedom Index: China--NOT FREE; Pakistan--PARTLY FREE**
- **Economist Intelligence Unit Instability: China--MODERATE RISK (4.8); Pakistan--VERY HIGH RISK (7.8)**
- Political concern in the region is, of course, dominated by the situations in Pakistan and Afghanistan. The fate of nuclear armed Pakistan, given the influence of extremists in political, military and intelligence circles, causes particular unease in the region and worldwide while the ultimate fate of Afghanistan could be decided in the coming year.
- While Central Asia and South East Asia appear to be relatively stable and China presents only a moderate risk, the state of affairs in North Korea rivals that of Pakistan with a succession looming. While the North Koreans and Chinese appear to be moving to ensure a peaceful leadership transition, there are too many unknowns to consider the situation fully under control.

Media Environment

- **Freedom House Press Freedom Index: China--NOT FREE (181/196); Pakistan--NOT FREE (134/196) in 2010**
- **Reporters Without Borders Index: China--84.50 (168/175); Pakistan--37.33 (159/175) in 2009**
- There is a strong tradition of English usage in South Asia—Bangladesh, India and Pakistan due to the legacy of the British Empire. However, particularly in Central Asia, there is very little English knowledge and use, resulting in a tremendous variation in the use of English across the region. In urban Pakistan 14 percent of adults claim some English knowledge. In Indonesia the figure is 9 percent. In most areas of China, Cambodia, Central Asia, however, the figure hovers at about 2 percent.
- In South Asia, influential English-language newspapers and national and local broadcasters providing both news and entertainment, targeting the better educated. Outside South Asia, there is little indigenous material in English and few understand the language. Even in India and Pakistan, only half of those professing to know English say they can understand most or all of a broadcast in the language.



PROFILE



Voice of America



Language of Broadcast: English

Content: 10.5 hrs. of original radio programming per week;
0.5 hrs. of original TV programming per week; Internet

Distribution: Radio on IBB FMs in Iraq and Kuwait, SW and ArabSat

Radio: The English Division has just begun regionalizing programming to the Middle East; *Middle East Monitor* (evening) delivers targeted news and information; *International Edition* contains world news. Also, current affairs programming which includes *Press Conference*, *USA* features interviews about critical issues; *Encounter*, panel discussion, and *Issues in the News*, correspondents' discussion.

TV: *On the Line* is an interview program dealing with current events.

Digital distribution: Includes articles, photos, video, audio, and other multimedia forms such as flash. Platforms include voanews.com, Facebook, Twitter, mobile and limited SMS. The English website has the largest audience of any of VOA's services.

Staff: Please see English to Asia, pg. 44.

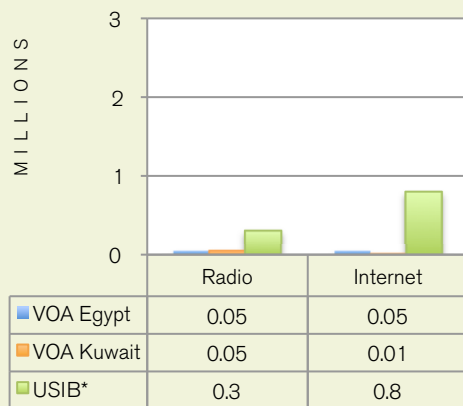
Budget: Please see English to Asia, pg. 44.

Established: 1942 to present



PERFORMANCE DATA (Using Data from Egypt and Kuwait, January 2010)

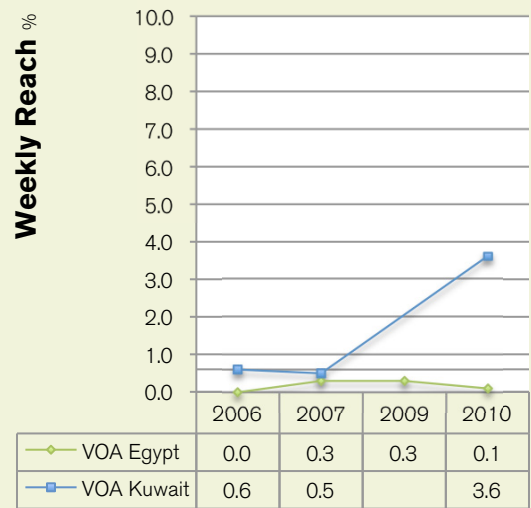
Audience Size



Weekly Reach (%) by Media

	VOA Egypt	VOA Kuwait
Radio	0.1	3.6
TV	na	na
Internet	0.1	0.4
Total	0.1	3.6

Weekly Reach %



Awareness (%)

	VOA Egypt	VOA Kuwait
	2	29

Credibility

Percentage of surveyed weekly audience that found broadcasts credible (%)

	VOA Egypt	VOA Kuwait
Radio	na	na
TV	na	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

	VOA Egypt	VOA Kuwait
Current Events	na	na
U.S. Culture	na	na
U.S. Policies	na	na

Quality

Combined Scores from audience panel

	VOA Egypt	VOA Kuwait
Radio	na	na
TV	na	na

* USIB audience estimate is based on data from Algeria, Bahrain, Egypt, Iran, Iraq, Jordan, Kuwait, Lebanon, urban Morocco, Oman, Palestinian Territories, Qatar, Saudi Arabia, Tunisia, Turkey and UAE.

**Sample of VOA English weekly listeners in Egypt is too small for meaningful analysis.

Data are from a nationwide survey of adults (15+) in Egypt and a survey of adult (15+) nationals and Arab expatriates in Kuwait, both conducted in January 2010.

English to Middle East Broadcasting

A U D I E N C E C O M P O S I T I O N

Total Population of Egypt 80.4 million and Kuwait 3.1 million


	Egypt Sam.	VOA Egypt**	Kuwait Sam.	VOA Kuwait
Sex	%	%	%	%
Male	53	na	62	68
Female	47	na	38	32
Age				
15-24	32	na	24	9
25-34	25	na	34	30
35-44	18	na	25	34
45-54	15	na	11	18
55-64	8	na	6	9
65+	2	na	1	0

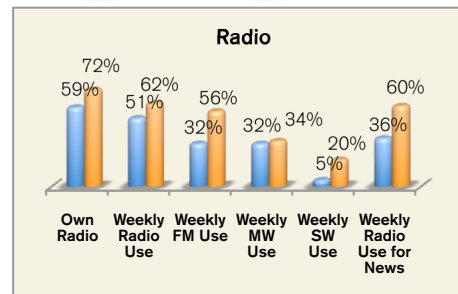
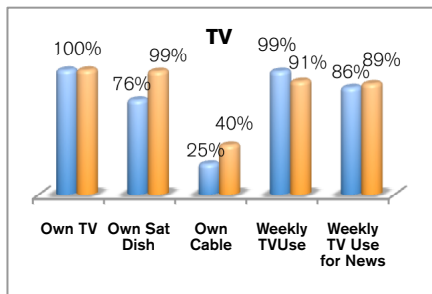
	Egypt Sam.	VOA Egypt*	Kuwait Sam.	VOA Kuwait
Education	%	%	%	%
illiterate/No Formal	13	na	<1	0
Elem./Inter.	19	na	5	0
Sec.	35	na	42	27
Coll./Univ.	32	na	51	73
Ethnicity/Nationality				
na	na	na	na	na

	Egypt Sam.	VOA Egypt**	Kuwait Sam.	VOA Kuwait
Residence	%	%	%	%
Urban	42	na	100	100
Rural	58	na	na	na
Language Spoken At Home				
na	na	na	na	na

**Sample of VOA English weekly listeners in Egypt is too small for meaningful analysis.

M E D I A U S E

 Egypt  Kuwait

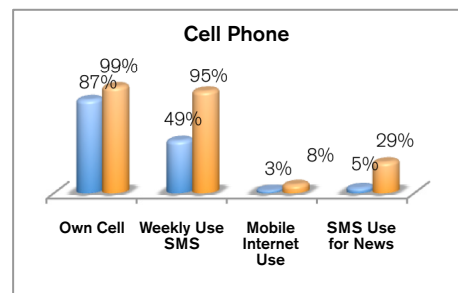
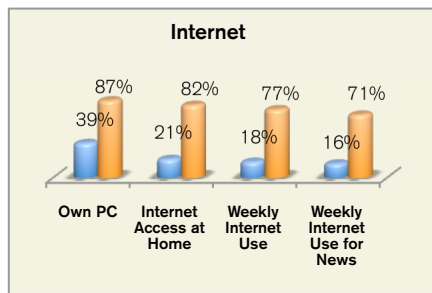


Egypt Top Ten Media Outlets

1. Al Mehwar
2. Al Jazeera
3. Dream 2
4. Dream 1
5. Egyptian Channel 1
6. Ezaat El Koran
7. Egyptian Space
8. Ikraa
9. Egyptian 2
10. MBC

Kuwait Top Ten Media Outlets

1. Al Jazeera
2. MBC 1
3. Al Rai
4. Al Arabiya
5. MBC Action
6. Egyptian Space
7. KTV1 (General)
8. Marina FM 88.8
9. Quraan Kareem
10. Ikraa



Egypt New Media Index Rankings

Overall Rank	26/54
Wired Rank	26/54
Mobile Rank	25/54

Web Analytics

Weekly Visitors	467,152+
Weekly Visits	802,718+
† Worldwide English totals.	

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: Egypt--NOT FREE; Kuwait--PARTLY FREE**
- **Economist Intelligence Unit Instability: Egypt--MODERATE RISK (5.4); Kuwait--MODERATE RISK (5.5)**
- There has been minimal change in political freedom in the Arab world in the recent past. The oil-rich Gulf monarchies, the kingdoms of Jordan and Morocco, and the largely single party systems of Syria, Egypt, and Tunisia remain static with state censorship, corruption and nepotism; all political staples throughout the Arab world.
- Democratic elections took place in Lebanon in 2009, but violence between Syria, Hezbollah and Israel have undermined a return to real democracy.

Media Environment

- **Freedom House Press Freedom Index: Egypt--PARTLY FREE (130/196); Kuwait--PARTLY FREE (115/196) in 2010**
- **Reporters Without Borders Index: Egypt--51.38 (143/175); Kuwait--15.25 (60/175) in 2009**
- English comprehension and usage varies widely in the MENA region due to the historical presence of Britain and the high levels of education in some countries, especially the very affluent Gulf States. In Kuwait 43% of adults say they can understand most or all of a radio broadcast in English, in Egypt, 12% and Iraq 3%.
- While use of English is increasing in the region, Arabic and French remain the languages most used in commerce, government and education. To serve the expatriate population and the local English-speakers, several countries sponsor English-language broadcasts on state media.
- Both self-censorship and state censorship still pervade in most of the region, for example in countries like Tunisia, Syria, Saudi Arabia, and Egypt. Despite increased freedom of the press spurred by the rise of satellite television channels and Internet use, state control is the rule.



PROFILE



Language of Broadcast: Special English

Content:

Radio: 10 hours of original programming per week including 10-minutes of news at the beginning of 7 daily half-hour programs; feature programming includes health, American life, science/technology and US history; Internet.

TV: Five 4-minute modules per week for English learning; subjects include development, education and agriculture.

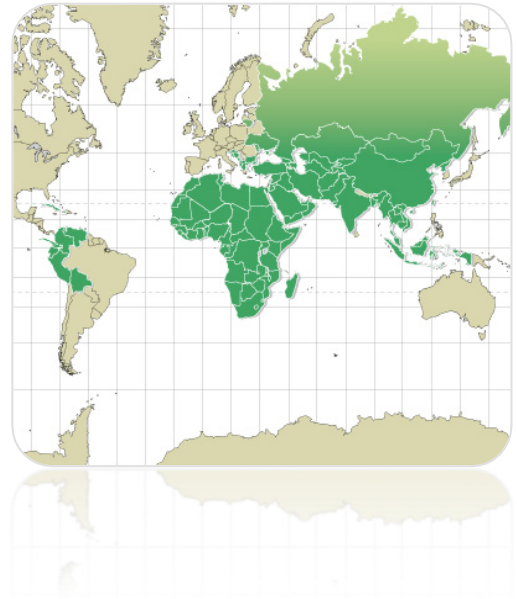
Distribution: Radio, worldwide to 27 affiliates and SW and MW, TV on satellite to affiliates

Digital distribution: Includes articles, photos, video, audio, and other multimedia forms. Platforms include voanews.com/learningenglish, Facebook, Twitter and mobile.

Staff: Please see English to Asia, pg. 44.

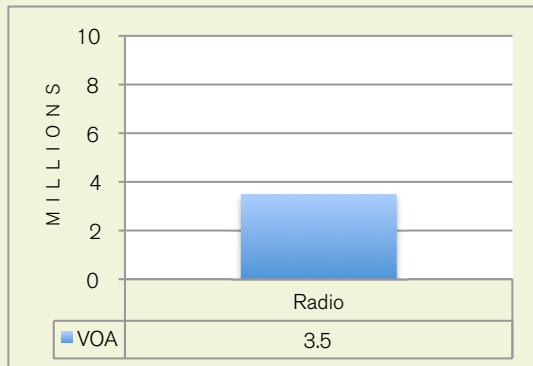
Budget: Please see English to Asia, pg. 44.

Established: 1942 to present



PERFORMANCE DATA *

Audience Size*



Weekly Reach by Media (%) *

VOA	
Radio	< .1 (17 countries) – 6.6 (Mogadishu)
TV	na
Internet	na
Total	< .1 (17 countries) – 6.6 (Mogadishu)

Weekly Reach %

Audience size is an approximate, minimum estimate based on data from 40 countries. Reach is calculated based on national populations and therefore cannot be estimated here.

VOA

Awareness (%)

VOA

na

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

VOA	
Radio	na
TV	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

VOA	
Current Events	na
U.S. Culture	na
U.S. Policies	na

Quality

Combined Scores from audience panel

VOA	
Radio	3.7
TV	3.6

See footnote for source data information.

*Audience estimate is an approximate, minimum estimate based on data from 40 countries: Afghanistan, Albania, Angola (Luanda only), Armenia, Azerbaijan, Bangladesh, Belarus, Bosnia, Burma, Burundi, Cambodia, China, Ecuador, Ethiopia, Georgia, Ghana, Guinea, Haiti, Indonesia, Kazakhstan, Kenya, Kosovo, Kyrgyzstan, urban Laos, Moldova, Montenegro, Niger, Nigeria, Pakistan (excluding FATA), Russia, Rwanda, Senegal, Serbia, Somalia (Mogadishu only), Tajikistan, Tanzania, Tatarstan, Uganda, Ukraine, Uzbekistan and Vietnam (8 regions with the 30 most important urban centers, including rural areas). Special English data are not available for MENA countries.

**The audience composition profile is for the VOA Special English audience in Afghanistan only. It is presented as an example and should not be taken as representative of the global Special English audience.

Special English Broadcasting

A U D I E N C E C O M P O S I T I O N

Total Population of Target Countries: na

	Afghanistan Sample**	VOA Weekly Audience**
Sex	%	%
Male	55	76
Female	45	24
Age		
15-24	32	39
25-34	25	18
35-44	22	18
45-54	11	9
55-64	6	9
65+	3	6

	Afghanistan Sample**	VOA Weekly Audience**
Education	%	%
None	61	27
Primary	19	12
Secondary	16	39
Higher	3	21
Ethnicity/Nationality		
Pashtun	40	33
Tajik	31	33
Uzbek	11	9
Other	16	24

	Afghanistan Sample**	VOA Weekly Audience**
Residence	%	%
Urban	21	30
Rural	79	70
Language		
Dari	50	61
Pashto	37	30
Uzbek	11	6
Other	6	3

**The audience composition profile is for the VOA Special English audience in Afghanistan only. It is presented as an example and should not be taken as representative of the global Special English audience.

M E D I A U S E

TV
Media Use Data Unavailable.

Radio
Media Use Data Unavailable.

Internet
Media Use Data Unavailable.

Cell Phone
Media Use Data Unavailable.

New Media Index Rankings

Overall Rank	na/54
Wired Rank	na/54
Mobile Rank	na/54

Web Analytics

Weekly Visitors	467,152†
Weekly Visits	802,718†

† Worldwide English totals.

C O N T E X T

Media Environment

- **Freedom House Press Freedom Index:** na
- **Reporters Without Borders Index:** na
- Research consistently demonstrates that many, and perhaps a majority, of people who say they know English as a second language actually have difficulty understanding normal radio or television broadcasts in the language, and are therefore good targets for the Special English programs. These programs are especially valuable for the millions of people around the world who want to learn American English.
- Large potential audiences are most likely found in South and East Asia, as well as parts of Africa.

PROFILE



Voice of America



Language of Broadcast: French to Africa

Content: 23 hrs. of original radio programming per week; 1 hr. of original TV programming per week; Internet

Distribution: 59 affiliates (FM and MW); 3-5 IBB SW frequencies; 2 IBB FMs, 1 in Ouagadougou and 1 in Abidjan; two shared IBB FM, 1 in Djibouti and 1 in Kigali; and 12 TV affiliates.

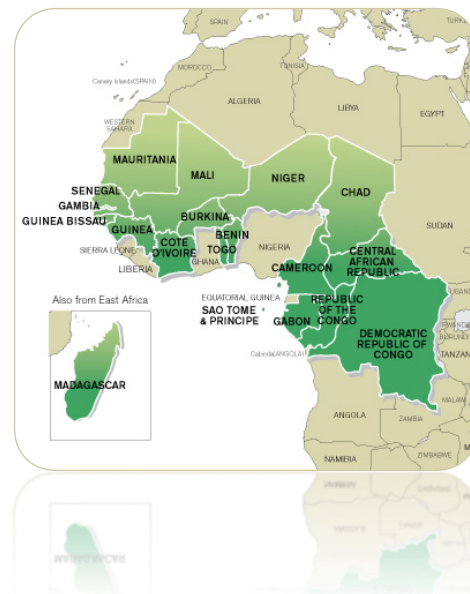
Radio: The bulk of the French to Africa audience is in DR Congo, where VOA's partner, RAGA-FM, is heard in almost all the major cities of the country. In addition, VOA has affiliates in Dakar and Kaolack, Senegal; Yaounde and Douala, Cameroon; Bamako, Mali; Libreville, Gabon; Lome and Sokode, Togo; and Conakry, Guinea.

TV: French to Africa has a co-production arrangement with Raga-TV in DR Congo, sending packages to affiliates in Gabon, Benin, Guinea, Niger, Cameroon/Douala, and the DRC. Similar arrangements are being made with affiliates in Burkina Faso, Cameroon and Togo. These affiliates can also download French to Africa's own packages, besides the service's weekly TV show *Washington Forum*.

Staff: 18

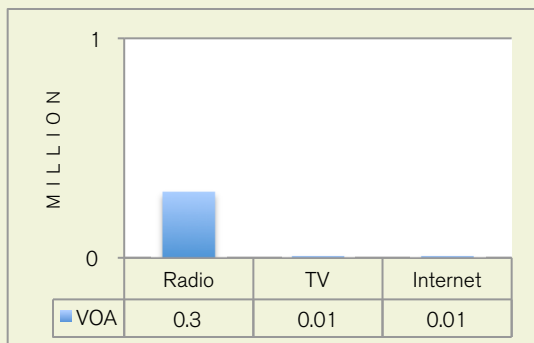
Budget: \$2,593,000

Established: 1960 to present



PERFORMANCE DATA (Using Data from Guinea, December 2009)*

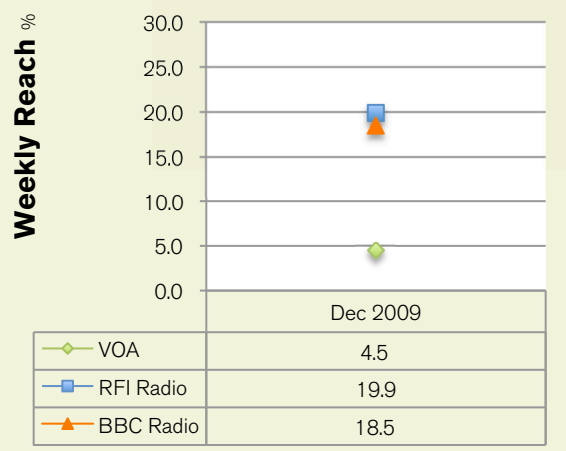
Audience Size



Weekly Reach (%) by Media

VOA in Guinea	
Radio	4.4
TV	0.2
Internet	0.2
Total	4.5

Weekly Reach %



Awareness (%)

VOA in Guinea	
	26

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)	
VOA in Guinea	
Radio	96
TV	na**

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)	
VOA in Guinea**	
Current Events	98
U.S. Culture	78
U.S. Policies	89

Quality

Combined Scores from audience panel	
VOA	
Radio	3.6
TV	3.4

*Audience data are for Guinea only, where the most recent survey for the French to Africa service was conducted. Weekly reach figures for French to Africa from other surveys include: 2.2% in Burundi (Mar 2010); and 2.0% in Niger (Sep 2008). VOA French to Africa broadcasts to 22 sub-Saharan countries in which French is an official or semi-official language.

**Samples of VOA TV viewers in the survey are too small for meaningful analysis.

***In most African countries where French is an official language only a minority of the population actually can understand it, so VOA's performance is best assessed by measuring the audience within the universe of French speakers. In Guinea, 16.6% of French speakers listen to VOA weekly; in Burundi the figure is 7.3% and in Niger 20.8%.

**** Third party research conducted in four DRC cities in 2009 found VOA weekly listening rates ranging from 9% to 24%.

Data are from a December 2009 nationwide survey of adults (15+) in Guinea.*

French to Africa Broadcasting

A U D I E N C E C O M P O S I T I O N * Total Population of Target Country (Guinea): 10.8 million*

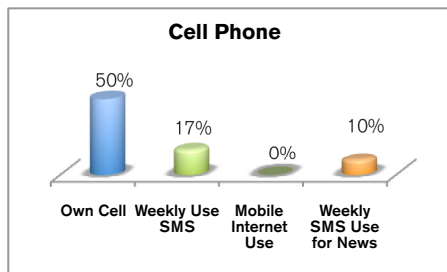
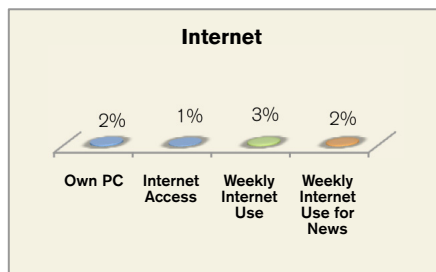
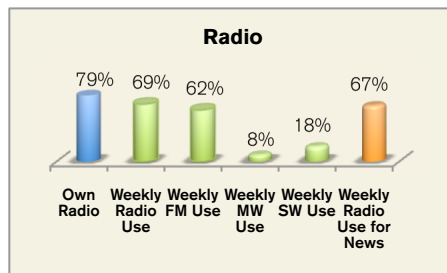
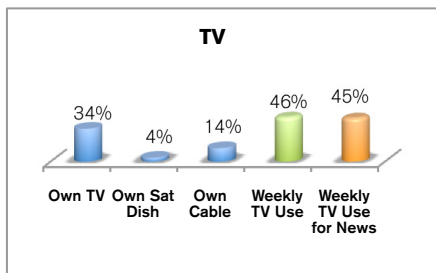
	Sample	VOA Weekly Audience
	100%	4.5%
Sex	%	%
Male	45	94
Female	55	6
Age		
15-24	29	14
25-34	24	16
35-44	17	18
45-54	15	24
55-64	9	19
65+	7	10

	Sample	VOA Weekly Audience
Education	%	%
No formal	66	37
Primary/Koranic	11	7
Secondary/Vocational	13	24
Higher	4	22
Ethnicity/Nationality		
Peulh/Pulaar	37	37
Malinke/Maninka	32	26
Soussou/Sousso	19	12
Other	13	24

	Sample	VOA Weekly Audience
Residence	%	%
Urban	68	51
Rural	32	49
Language		
Peulh/Pulaar	35	33
Malinke/Maninka	29	24
Soussou/Sousso	24	29
French	1	3
Other	11	11

*Audience data are for Guinea only, where the most recent survey for the French to Africa service was conducted. Weekly reach figures for French to Africa from other surveys include: 2.2% in Burundi (Mar 2010); and 2.0% in Niger (Sep 2008). VOA French to Africa broadcasts to 22 sub-Saharan countries in which French is an official or semi-official language.

M E D I A U S E (Using Data from Guinea, December 2009)*



Top Ten Media Outlets

1. Radio Guineenne
2. France 24
3. Television Guineenne
4. Radio Familia FM
5. TV5 Monde
6. Canal Horizons
7. Espace FM
8. Radio Sabari
9. Radio Nostalgie
10. Horizon FM

Top Ten Sources of News

1. Télévision Guinéenne
2. Radio Guineenne
3. BBC
4. Radio France Intl
5. TV 5
6. Radio Familia FM
7. Canal Horizons
8. VOA
9. Horoya
10. Radio Sabari

New Media Index Rankings

Overall Rank na/54
Wired Rank na/54
Mobile Rank na/54

Google Analytics

Weekly Visitors 2,192
Weekly Visits 4,629

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: NOT FREE in 2010**
- **Economist Intelligence Unit Instability: VERY HIGH RISK (7.5) in 2009/2010**
- Guinea is among the poorest countries in the world and, since the military coup d'état in December 2008, has suffered from political instability.
- On September 28, 2009, military junta troops brutally beat and raped 50,000 people that were gathered at a rally opposing the government, killing up to 157 of them. The massacre was heavily condemned by the United Nations and the International Criminal Court.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (153/196) in 2010**
- **Reporters Without Borders Index: 28.50 (100/175) in 2009**
- The Media Foundation of West Africa reports that in September 2009, the Guinean government banned political programming and call-in shows and that self-censorship was prevalent as media outlets were "threatened on a daily basis." The intimidation was also directed towards international and state-run media, including death threats that caused some reporters to flee to nearby Senegal.
- While TV ownership has more than doubled since 2003, radio is still the predominant source of news by a wide margin. People rely on word-of-mouth slightly more often than TV, and Internet is still nascent in Guinea.
- Although SW use has decreased, it still exceeds use of MW nationwide.

PROFILE



Language of Broadcast: Georgian

Content: 7 hrs. of original and 7 hrs. of repeat radio programming per week; Internet

Distribution: VOA's Georgian Service is heard on one affiliate, the Georgia Public Broadcasting, the country's most powerful FM distribution facility. It simulcasts the Service's one hour daily broadcast at 8 to 9 PM local time. Broadcasts are also heard on 3 IBB shortwave frequencies between 9 and 10 PM local time.

Staff: 6

Budget: \$1,008,000

Established: 1951 to present; TV service to be established in 2010



Language of Broadcast: Georgian

Coverage: 26 hrs. of original and 2 hrs. of repeat radio programming per week; one hour of original TV programming per week; Internet

Distribution: 2 affiliates (2 FM)

RFE/RL delivery includes 2 national FM networks and 6 regional FM affiliates, HotBird, AsiaSat and Internet with streaming audio in addition to 1 national TV affiliate carrying a weekly 60 minute program and 2,000 copies of bi-monthly newspaper.

Staff: 10

Budget: \$2,651,000

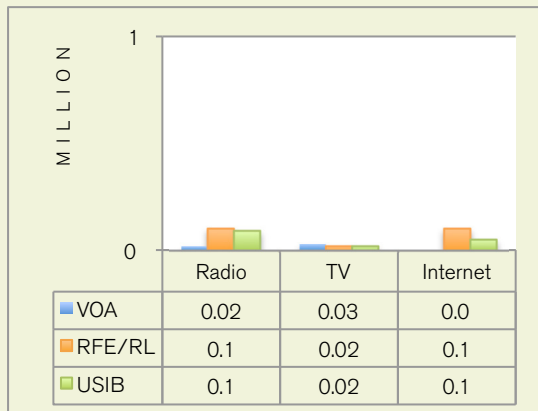
Established: 1953 to present*

*In addition to radio, TV, and Internet offerings, RFE/RL broadcasts a daily one-hour Russian language program and delivers information to Georgia's breakaway regions, Abkhazia and South Ossetia. Delivery includes 2 national FM networks and 2 regional FM affiliates, multiple SW frequencies, HotBird, AsiaSat and Internet with streaming audio, in addition to 2,000 copies of Russian language bi-monthly newspaper.



PERFORMANCE DATA (Using Data from Georgia, March 2010)

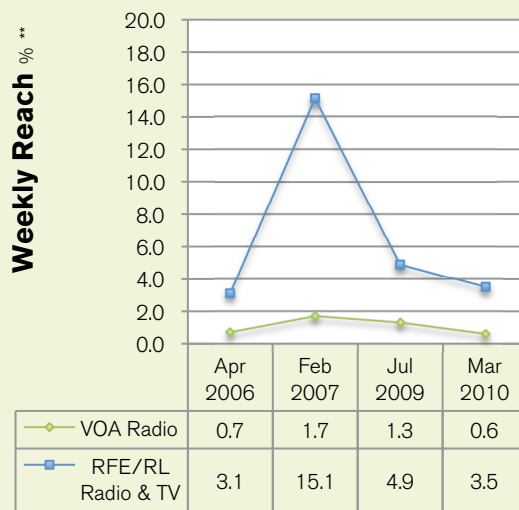
Audience Size



Weekly Reach (%)

	VOA	RFE/RL	USIB
Radio	0.6	2.9	3.2
TV	na	0.6	0.6
Internet	< .1	0.2	0.2
Total	0.6	3.5	3.7

Weekly Reach



Awareness (%)

VOA	RFE/RL
34	46

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)**

	VOA	RFE/RL Radio
Radio	na	97
TV	na	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)**

	VOA	RFE/RL Radio
Current Events	na	81
U.S. Culture (VOA) or Current Events In Georgia (RFE/RL)	na	80
U.S. Policies	na	na

Quality

Combined Scores from audience panel

	VOA	RFE/RL
Radio	3.4	3.4
TV	na	na

*Samples of VOA radio and RFE/RL TV weekly audiences in the survey are too small for meaningful analysis. **Weekly reach figures for RFE/RL include TV beginning in February, 2007.

Data are from a March 2010 nationwide survey of adults (15+) in Georgia.

Georgian Broadcasting

A U D I E N C E C O M P O S I T I O N

Total Population of Target Country: 4.6 million

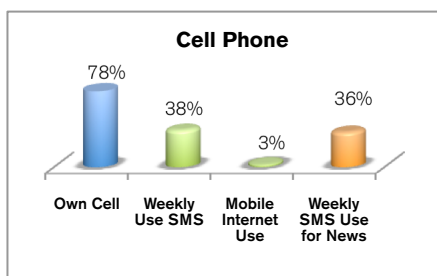
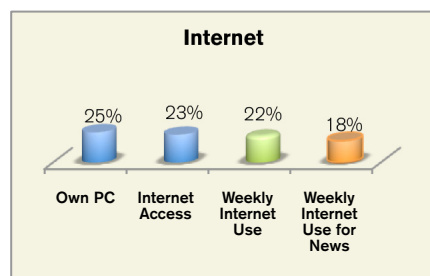
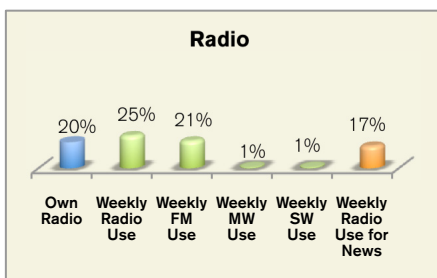
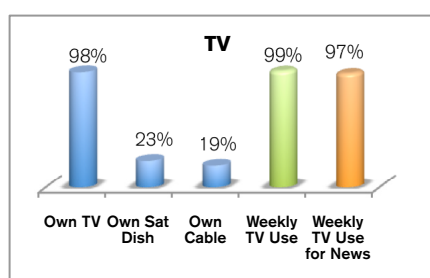
	Sample	VOA Weekly Aud.*	RFE/RL Weekly Aud.
Sex	%	%	%
Male	46	na	56
Female	54	na	44
Age			
15-24	21	na	15
25-34	19	na	21
35-44	16	na	18
45-54	13	na	23
55-64	13	na	12
65+	17	na	12

	Sample	VOA Weekly Aud.*	RFE/RL Weekly Aud.
Education	%	%	%
None	0	na	0
Primary	23	na	0
Secondary	51	na	53
Coll./Univ.	26	na	47
Ethnicity/Nationality			
Georgian	88	na	99
Azerbaijani	7	na	0
Armenian	3	na	0
Other	2	na	1

	Sample	VOA Weekly Aud.*	RFE/RL Weekly Aud.
Residence	%	%	%
Urban	50	na	48
Rural	50	na	52
Language			
Georgian	90	na	100
Russian	2	na	0
Other	8	na	0

*Samples of VOA radio and RFE/RL TV weekly audiences in the survey are too small for meaningful analysis.

M E D I A U S E



Top Ten Media Outlets

1. Imedi TV
2. Rustavi TV
3. Georgian Public TV 1
4. Adjara State TV
5. Mze
6. Kavkasia
7. NTV
8. ORT-1 Evraziya
9. Radio Ar Daidardo
10. Pirveli Stereo

Top Ten Sources of News

1. Imedi TV
2. Rustavi TV 2
3. Georgian Public TV 1
4. Kviris Palitra
5. Kavkasia
6. Asaval dasavali
7. Radio Imedi
8. Az TV
9. Ajara State TV
10. ORT-1 Evraziya

New Media Index Rankings

Overall Rank	23/54
Wired Rank	24/54
Mobile Rank	18/54

Web Analytics

VOA Weekly Visitors	732
Weekly Visits	1,573
RFE/RL Weekly Visitors	6,174
Weekly Visits	20,297

C O N T E X T



Political Environment

- **Freedom House Political Freedom Index: PARTLY FREE in 2010**
- **Economist Intelligence Unit Instability: HIGH RISK (6.3) in 2009/2010**
- After several turbulent years, the political landscape in Georgia during the past year has somewhat stabilized. There were no major crises or significant public protests. The incumbent president Mikheil Saakashvili and his party were able to boost their popularity and win local elections on May 30, 2010.
- A weak and fractured opposition is variously calling for early parliamentary and presidential elections or ousting the current President and his administration through massive protests.
- The parliament of Georgia is considering a new draft of the Constitution that would turn Georgia from presidential republic to a parliamentary one. Some see it an attempt by Saakashvili to safeguard a position of prime minister after his second presidential terms expires in 2013.
- Georgian relations with Russia remain tense. Taken together, these factors indicate that the Georgian political situation remains relatively unstable.

Media Environment

- **Freedom House Press Freedom Index: PARTLY FREE (126/196) in 2010**
- **Reporters Without Borders Index: 18.83 (81/175) in 2009**
- Georgian media continues to be polarized and divided between government and opposition. Allies of the Georgian government continue to exercise control over the two biggest sources of information for Georgians—Imedi TV and Rustavi2 TV which have maintained a strong pro-government line. Two opposition TV channels—Kavkasia and Maestro—still do not have licenses to broadcast outside of Tbilisi.
- USIBs' total weekly reach fell from 5.3 percent in 2009 to 3.7 percent in 2010. The major challenge for both USIB services is a trend of decreasing radio use in the country. Internet use, however, continues to grow. Currently, 18 percent of the population uses it weekly for news, similar to such sources as newspapers, Russian TV or radio.
- High speed Internet, available to the majority of Internet users, makes it possible for half of regular Internet users to access video and audio online.
- Social networking is booming in Georgia and while the Russia-originated odnoklassniki.ru site is still the most popular, facebook.com is gaining ground - 96 percent and 33 percent of regular social networking users visit the sites, respectively.

PROFILE



Language of Broadcast: Greek

Content: 3.5 hrs. of original and 0.5 hrs. of repeat radio programming per week; 5 min. of original and 5 min. of repeat TV programming per week; Internet

Distribution: 3 affiliates (2 FM, 1TV)

Radio: VOA Greek produces seven daily five-minute live news satellite programs (M-F) that are simulcast by Greece's top-rated news and information station, affiliate Radio SKAI (Sky) of Athens, and by Radio City International in Thessaloniki, Greece's second largest city. VOA news feeds are also carried by several of Radio SKAI's own affiliates as well as by a network of informal program partners from Canada to Australia through the Internet.

TV: The VOA Greek Service's news program, "Reportaz Apo Washington" (Washington Report), is broadcast five to ten minutes a week on one affiliate in Greece, TV Halkidiki. The program also airs on informal affiliates SKAI (Sky) TV of Athens and CYBC-1 TV of Nicosia.

Staff: 4

Budget: \$450,000

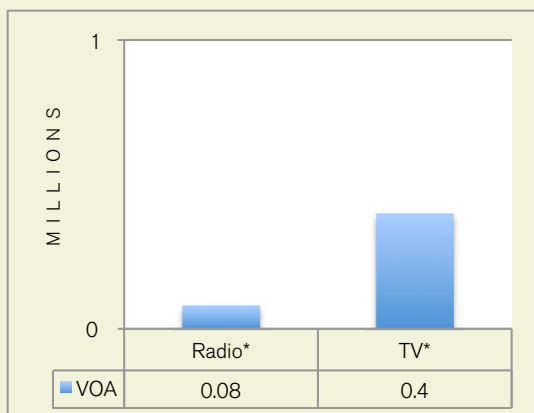
Established: 1942 to present; TV service established in 2006



PERFORMANCE DATA

(Using Data from Aug.-Dec., 2005 [radio] & Oct.-Dec. 2005 [TV])

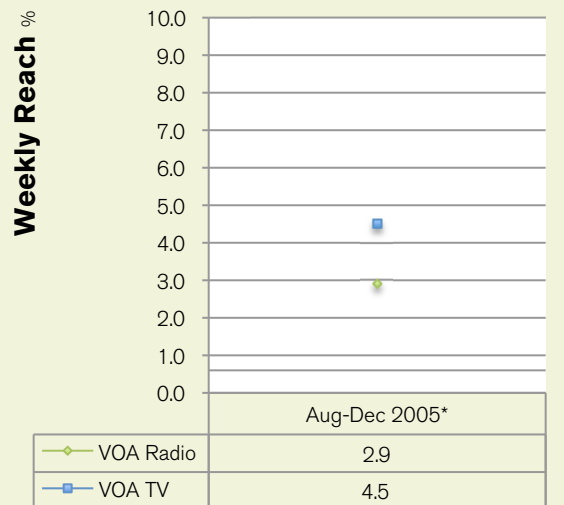
Audience Size



Weekly Reach (%) by Media

VOA	
Radio	2.9*
TV	4.5*
Internet	na
Total	na*

Weekly Reach



Awareness (%)

VOA	
	na

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

VOA	
Radio	na
TV	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

VOA Radio	
Current Events	na
U.S. Culture	na
U.S. Policies	na

Quality

Combined Scores from audience panel

VOA	
Radio	3.7
TV	na

*Radio listenership was recorded using 24-hour "day after" recall and a seven-day diary and reflects audiences in Greater Athens only. TV audience figure is based only on ALPHA TV viewership and does not include estimates for TV Halkidiki in northern Greece or VOA's partner CYBC in Cyprus. Total unduplicated reach figure cannot be derived due to lack of single source data.

Radio reach figures are from a Focus BARI Media Radio Survey in Athens only, August-December 2005. Television figures are from an AGB Nielsen Peoplemeter panel, October-December 2005.

Greek Broadcasting

Total Population of Greece: 11.3 million

A U D I E N C E C O M P O S I T I O N

	Sample	VOA Weekly Audience
Sex	%	%
Male	na	na
Female	na	na
Age		
15-24	na	na
25-34	na	na
35-44	na	na
45-54	na	na
55-64	na	na
65+	na	na

	Sample	VOA Weekly Audience
Education	%	%
None	na	na
Primary	na	na
Secondary	na	na
Coll./Univ.	na	na
Ethnicity/Nationality		
Albanian	na	na
Serbian	na	na
Other	na	na

	Sample	VOA Weekly Audience
Residence	%	%
Urban	na	na
Rural	na	na
Language		
Albanian	na	na
Serbian	na	na
Other	na	na

M E D I A U S E

TV
Media Use Data Unavailable

Radio
Media Use Data Unavailable

New Media Index Rankings

Overall Rank	na/54
Wired Rank	na/54
Mobile Rank	na/54

Google Analytics

Weekly Visitors	1,229
Weekly Visits	1,833

Internet
Media Use Data Unavailable

Cell Phone
Media Use Data Unavailable

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: FREE in 2010**
- **Economist Intelligence Unit Instability: HIGH RISK (6.35) in 2009/2010**
- The global financial crisis, coupled with excessive public spending, wide-spread corruption and lack of accountability, led Greece to the brink of a debt default in the spring of 2010.
- The country was saved from imminent collapse by a \$146.2bn EU aid package which called for urgent austerity measures. The Greek public responded with rallies and strikes, some of which turned violent.
- Public opinion surveys conducted over the past few months show that Greeks do not trust the country's two main political parties or their long-overdue promises to end corruption and nepotism. The World Bank ranks Greece the most corrupt among the 16 Eurozone countries.

Media Environment

- **Freedom House Press Freedom Index: FREE (63/196) in 2010**
- **Reporters Without Borders Index: 9.00 (35175) in 2009**
- Television is Greece's dominant medium. Since the late 80s, the market has been expanding quickly, with hundreds of new commercial TV services engaging in fierce competition. Digital TV services are commercially available via IPTV and satellite; broadband penetration is growing. On the other hand, there is a lack of existing cable TV services and satellite TV penetration is low.
- Overall, the number of radio and TV outlets is estimated at close to 1,800. EU standards are not consistently applied and many of these broadcasters are unlicensed. There is also a vibrant press, with a total of 87 newspapers in national circulation.
- Violence against the media is not unheard of and is rather shocking by European standards. According to a Reporters Without Borders 2009 report, journalists are often physically assaulted by various extreme groups when covering social unrest. In addition, they are often targeted for their investigative reporting on sensitive political issues.



PROFILE



Language of Broadcast: Hausa

Content: 13 hrs. of original radio programming per week; Internet

Distribution: 23 affiliates (23 FM), 1 IBB MW and 3 - 5 SW frequencies

Hausa has four 30-minute air-shows Monday through Friday and 3 on Saturday and Sunday. These are broadcast through SW, MW and FM frequencies. Hausa also offers live and recorded broadcasts on the Internet, and at hausavoa.mobi provides the latest news to mobile phone users. The Service has 5 active FM affiliates, all of them in Niger Republic, and several local radio stations in Nigeria also carry packaged VOA Hausa programming.

Staff: 11

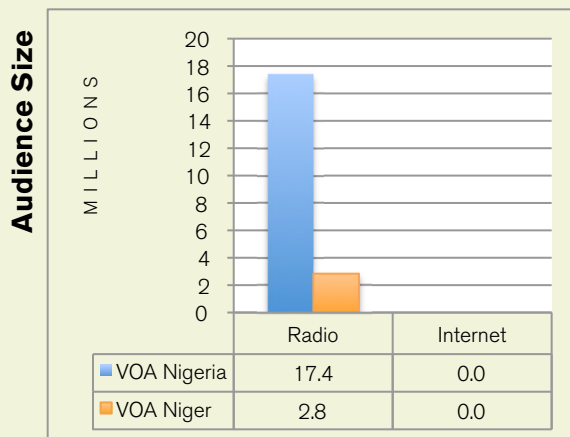
Budget: \$1,842,000

Established: 1979 to present



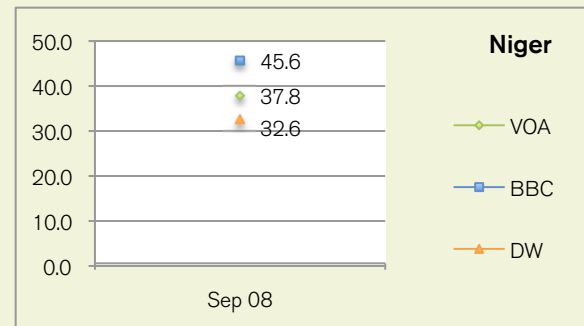
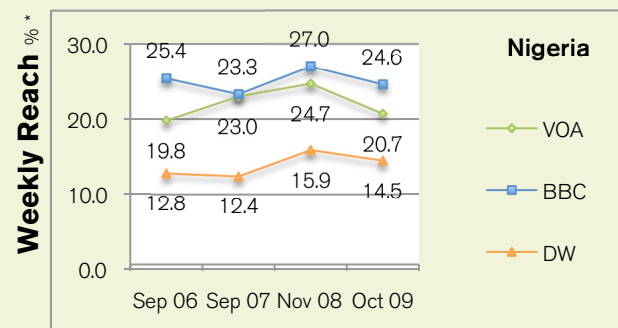
PERFORMANCE DATA

(Using Data from Nigeria, October 2009 & Niger, Sept, 2008)



Weekly Reach by Media (%)		
	Nigeria	Niger
Radio	20.7	37.8
TV	na	na
Internet	< .1	< .1
Total	20.7	37.8

Awareness (%)		
	Nigeria	Niger
	54	64



Credibility

Percentage of surveyed weekly audience that found broadcasts credible (%)		
	Nigeria	Niger
Radio	97	99
TV	na	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)		
	Nigeria	Niger
Current Events in Country	82	82
U.S. Culture	79	47
U.S. Policies	76	46

Quality

Combined Scores from audience panel	
	VOA
Radio	3.3
TV	na

*Data in relation to national populations, not just Hausa speakers. Reach among Hausa speakers only is significantly higher.

Data are from an October 2009 survey of adults (18+) in Nigeria and a September, 2008 survey of adults (15+) in Niger.

Hausa Broadcasting

A U D I E N C E C O M P O S I T I O N

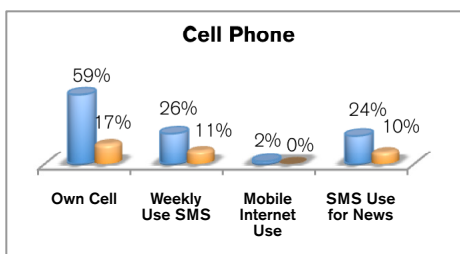
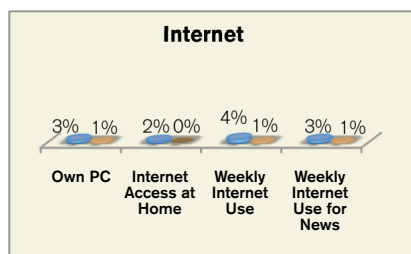
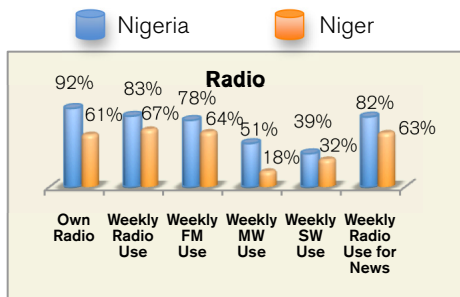
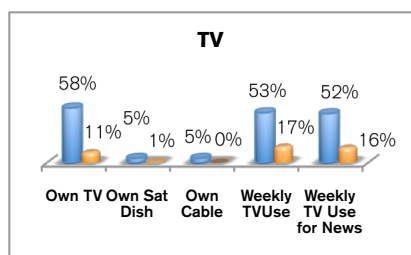
Total Population of Nigeria 158.3 million and Niger 15.9 million

	Nigeria Sam.	Nigeria Weekly Aud.	Niger Sam.	Niger Weekly Aud.
Sex	%	%	%	%
Male	49	73	45	66
Fem.	51	27	55	34
Age				
15-24	29	28	28	28
25-34	30	31	24	23
35-44	18	19	16	18
45-54	13	14	15	16
55-64	7	6	10	8
65+	3	1	7	6

	Nigeria Sam.	Nigeria Weekly Aud.	Niger Sam.	Niger Weekly Aud.
Educ.	%	%	%	%
None	41	55	82	78
Primary	21	21	10	11
Second.	31	20	5	7
Higher	8	5	3	5
Ethnicity/Nationality				
Hausa	42	75	62	79
Yoruba	22	<1	na	na
Igbo	10	1	na	na
Djerma	na	na	20	5
Other	26	23	18	16

	Nigeria Sam.	Nigeria Weekly Aud.	Niger Sam.	Niger Weekly Aud.
Residence	%	%	%	%
Urban	30	14	19	21
Semi-urb.	10	3	na	na
Rural	60	83	81	79
Language Spoken at Home				
Hausa	49	87	66	83
Yoruba	21	0	na	na
Igbo	9	1	na	na
Other	21	11	34	17

M E D I A U S E



Top Ten Sources of News (Nigeria)

1. NTA
2. BBC
3. VOA
4. FM Kano
5. Radio Jigawa
6. Osun Radio
7. Freedom FM
8. DW
9. KBC Kano
10. ABC I Yola

Top Ten Sources of News (Niger)

1. Tambara FM
2. Radio Fara'a
3. Alternative FM
4. Tele Sahel
5. Africa N.o.1
6. La Voix du Sahel
7. Dallol FM
8. L'Evennement
9. Radio Anfani FM
10. Douinia TV

New Media Index Rankings (Nigeria)

Overall Rank 39/54
Wired Rank 44/54
Mobile Rank 18/54

Web Analytics

Weekly Visitors 3,074
Weekly Visits 10,760

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: Nigeria—PARTLY FREE; Niger—PARTLY FREE in 2010**
- **Economist Intelligence Unit Instability: Nigeria—HIGH RISK (7.0); Niger—VERY HIGH RISK (7.5)**
- Cameroon and Ghana have small populations of Hausa speakers, and about half of Niger's small population speaks Hausa at home, but it is in oil-rich Nigeria—Africa's most populous and economically significant country—where the language is spoken by over 75 million that the impact of Hausa broadcasting is greatest.
- Censorship remains a serious issue for private broadcasters in Nigeria, with VOA's affiliates affected again this year. (Freedom FM's executive vice-chairman Alhaji Ado Mohamed was arrested in June). The problem is acute in the north as regional and local authorities lash out against content perceived as anti-Islamic.
- Nigeria ranks low on freedom indices. The State Security Service, a special police force that takes its orders from the president, has been on the Reporters Without Borders list of "Predators of Press Freedom" for several years.
- Nigeria has had an elected government since 1999, and the government is now challenged with keeping the country from fracturing along ethnic and religious lines. Umaru Yar'Adua of the ruling People's Democratic Party (PDP) won the presidency following the April 2007 elections, but died of illness in May 2010. Vice President Goodluck Ebele Jonathan, also of the PDP, was sworn in as Nigerian president one day after Yar'Adua's death.

Media Environment

- **Freedom House Press Freedom Index: Nigeria—PARTLY FREE (110/196); Niger—NOT FREE (151/196) in 2010**
- **Reporters Without Borders Index: Nigeria—46.00 (135/175); Niger—48.50 (139/175) in 2009**
- The media landscapes in the north and south of Nigeria differ dramatically. Media in the north continues to revolve around radio; access to and use of shortwave radio has not changed significantly for several years. Even among elites in capital cities in the north, television and Internet use are not prevalent.
- Reception issues are a continuing concern as the ban on simulcasts of foreign news continues, thus most listening to VOA takes place on shortwave. Nigeria continues to be a strong shortwave market, though this is almost entirely due to the habits of the Hausa population, as their daily use of shortwave radio is six times higher than that of other Nigerians.
- Hausa audiences are far less likely to watch television or use the Internet than are other Nigerians. While the most common way of going online is at Internet cafes, mobile phones represent the most prevalent means of personal access.
- Largely rural and very poor, Niger's media market is dominated by radio; there is low Internet and even TV penetration. Many people in villages rely on small community radio stations for local news and information.



Broadcasting
Board of
Governors

PROFILE



Language of Broadcast: Afan Oromo, Amharic, Tigrigna

Content: 12 hrs. of original radio programming per week; Internet

Distribution: Afan Oromo: 5 SW; Amharic: 5 IBB SW; Tigrigna: 5 IBB SW frequencies

The Horn of Africa Service broadcasts in Afan Oromo, Amharic and Tigrigna; each language has 5 IBB shortwave frequencies. The service also offers live and repeat audio in each of the 3 languages on Arabasat's BADR-4 satellite, each also has its own website. VOA also offers a Web-based newsletter to Ethiopian listeners through a proxy server.

Staff: 17

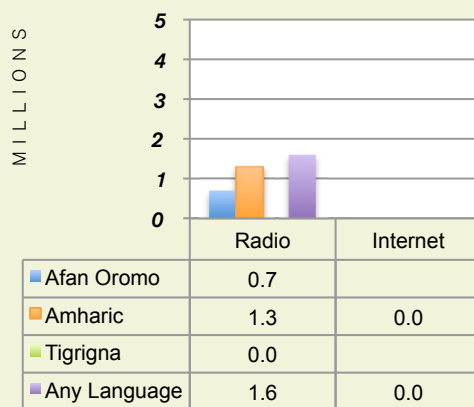
Budget: \$2,181,000

Established: Afan Oromo: 1996 to present; Amharic: 1982 to present; Tigrigna: 1996 to present



PERFORMANCE DATA (Using Data from Ethiopia, June 2009)

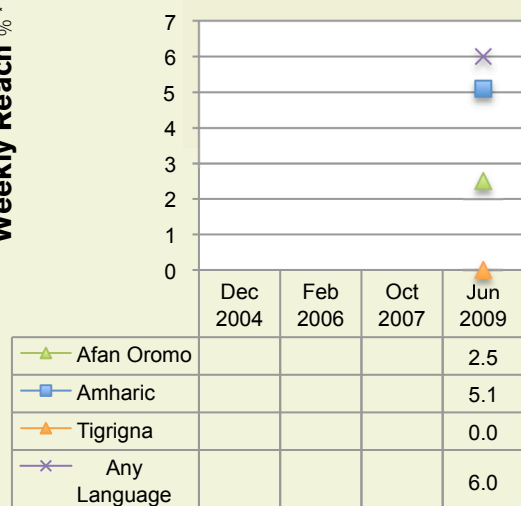
Audience Size



Weekly Reach by Media (%)

	Afan Oromo	Amharic	Tigrigna	Any Language
Radio	2.5	5.1	< .1	6.0
TV	na	na	na	na
Internet	na	< .1	na	< .1
Total	2.5	5.1	< .1	6.0

Weekly Reach %



Awareness (%)

VOA
52

Credibility

Percentage of surveyed weekly audience that found broadcasts credible (%)

	VOA
Radio	96
TV	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

	VOA
Current Events	88
U.S. Culture	48
U.S. Policies	57

Quality

Combined Scores from audience panel

	VOA
Radio	3.6
TV	na

Data are from a June 2009 survey of adults (18+) in Ethiopia. The regions included in the final sample (Oromiya, Addis Ababa, Dire Dawa and S.N.N.P.) account for 59% of adult population in Ethiopia.

*Due to differences in sample coverage between the 2009 survey and previous surveys of Ethiopia, it is not possible to display trend data.

Horn of Africa Broadcasting

A U D I E N C E C O M P O S I T I O N

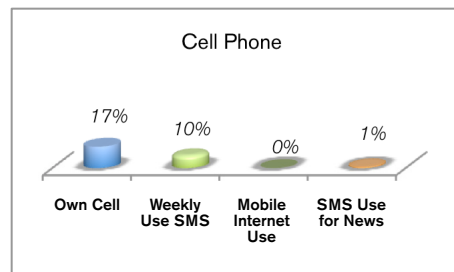
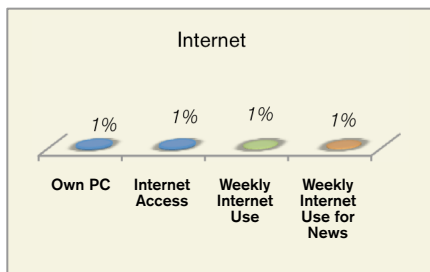
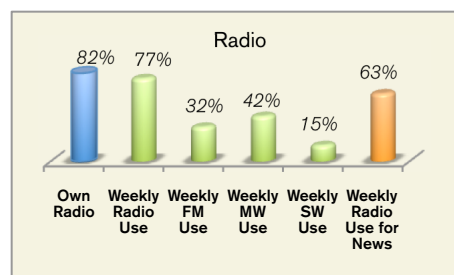
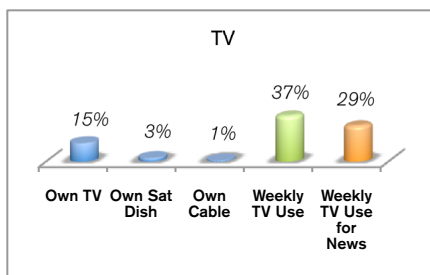
Total Population of Ethiopia: 82.8 million

	Sample	VOA Weekly Audience
Sex	%	%
Male	58	81
Female	42	19
Age		
15-24	32	20
25-34	30	37
35-44	18	21
45-54	11	14
55-64	5	6
65+	4	1

	Sample	VOA Weekly Audience
Education	%	%
None	16	4
Primary	40	31
Secondary	31	40
Vocational/Univ	13	26
Ethnicity/Nationality		
Oromo	35	29
Amhara	32	44
Guragi	9	8
Siadmo	7	4
Other	17	14

	Sample	VOA Weekly Audience
Residence	%	%
Urban	62	70
Rural	38	30
Language Spoken At Home		
Amharic	56	63
Afan Oromo	24	24
Tigrigna	1	1
Other	19	12

M E D I A U S E



Top Ten Media Outlets

1. ETV
2. Ethiopia Radio
3. FM Addis
4. ETV-2 Addis
5. Radio Fana FM
6. Sheger FM
7. FM Addis Admin
8. FM Awassa
9. VOA Horn of Africa
10. DW Amharic

Top Ten Sources of News

1. Ethiopia Radio
2. ETV
3. Radio Fana
4. FM Addis 97.1
5. FM Awassa
6. SABC
7. DW
8. VOA
9. Sheger FM
10. ETV-2 Addis

New Media Index Rankings

Overall Rank 51/54
Wired Rank 44/54
Mobile Rank 51/54

Web Analytics

Weekly Visitors 17,815
Weekly Visits 84,007

C O N T E X T

↓ **Stability**

↓ **Political Freedom**

↓ **Press Freedom**

↓ **Ease of Distribution**

↔ **Competition**

Political Situation

- **Freedom House Political Freedom Index: Ethiopia-NOT FREE; Eritrea-NOT FREE in 2010**
- **Economist Intelligence Unit Instability: MODERATE RISK (5.1) in 2009**
- Ethiopia's ruling Ethiopian People's Revolutionary Democratic Front (EPRDF) cracked down heavily on opposition in the run-up to May 2010 elections. Although the country avoided the violence that followed similarly questionable 2005 general elections, observers said the 2010 vote (in which the EPRDF and its allies won all but 2 seats in the parliament) was not up to international standards of free and fair elections.
- Media access and use are politically sensitive issues in Ethiopia, making research difficult. People are often reluctant to discuss any sources of news critical of the government, for fear of reprisal. In addition, permission to conduct research must be granted not only by national government authorities, but also by each regional authority. In recent years, permission to study media habits has been denied in various regions, including Amhara in 2008-2009. Remote and sparsely populated areas are difficult to cover adequately with national surveys, as do security concerns in certain regions.
- Eritrea is a one-party state, holds no free elections and allows no private news media.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (169/196) in 2010**
- **Reporters Without Borders Index: 49.00 (140/175) in 2009**
- Despite the opening of several private radio stations and newspapers, Ethiopia's media scene is still dominated by state-owned radio, TV, and newspapers. Private media houses and journalists have been subject to intimidation and arrest.
- In the months leading up to the 2010 general elections, the government attempted to jam all VOA broadcasts and some services of other international broadcasters. The Prime Minister made public statements accusing VOA of spreading "destabilizing propaganda" and comparing the station to those that incited violence during the 2004 Rwandan genocide.
- Despite recent indications of robust economic growth, Ethiopia remains one of the poorest countries in the world. Radio is the most widely used source of news, but access rates are lower than in most of Sub-Saharan Africa. Television is less widely used, particularly outside of Addis Ababa, and Internet use is virtually undetectable through national surveys because it is so rare and concentrated among urban elites. Mobile phones are now as widely available as TVs, but have not kept pace with the rapid expansion of mobile technology in other parts of East Africa.

PROFILE



Voice of America



Language of Broadcast: Indonesian

Content: 60 hrs. of original radio programming per week; 4 hrs. of original TV programming per week; Internet

Distribution: 59 major affiliates (44 FM, 4MW, 8 TV, 3 Internet), 3 IBB SW frequencies

Over 200 AM/FM affiliate stations in 128 cities relay VOA Indonesian's programming. The service produces three long form TV shows and 18 short TV segments for 9 of the 11 national TV stations and 2 regional stations. *Dunia Kita*, a 30-minute TV magazine show, is in its 10th season on Metro TV, Indonesia's version of CNN, a 24-hour news channel.

Many original VOA programs are re-run on more than 28 regional TV stations across Indonesia.

Staff: 44

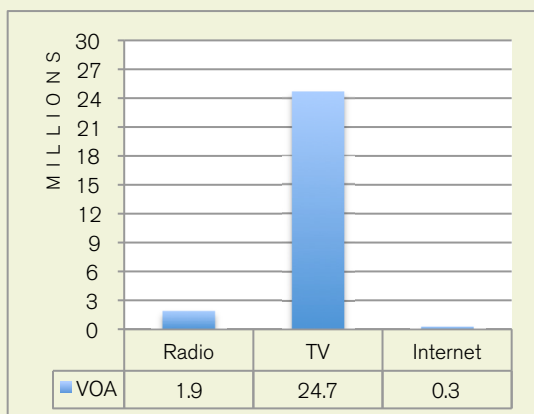
Budget: \$5,920,000

Established: 1942 to present



PERFORMANCE DATA (Using Data from Indonesia, April 2010)

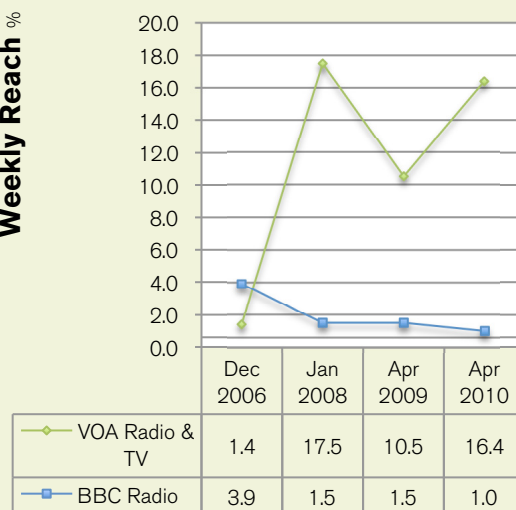
Audience Size



Weekly Reach by Media (%)

VOA	
Radio	1.2
TV	15.9
Internet	0.2
Total	16.4

Weekly Reach %



Awareness (%)

VOA	
	16

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

VOA	
Radio	100
TV	93

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

	VOA Radio	VOA TV
Current Events	100	na
U.S. Culture	72	na
U.S. Policies	55	na

Quality

Combined Scores from audience panel

VOA	
Radio	3.4
TV	3.3

Data are from an April 2010 survey of adults (15+) in Indonesia. The survey covered 21 of 32 provinces and is representative of 93% of the adult population.

Indonesian Broadcasting

A U D I E N C E C O M P O S I T I O N

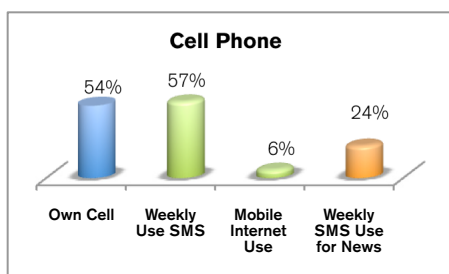
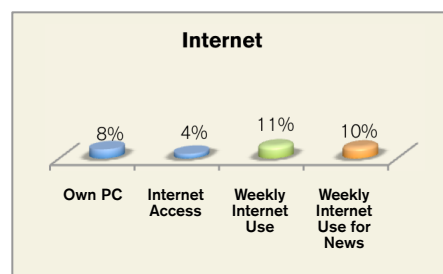
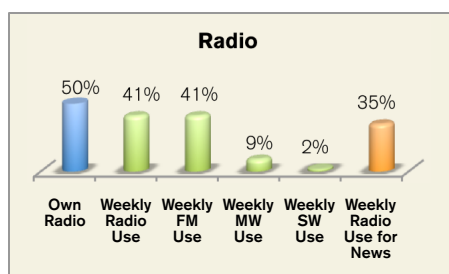
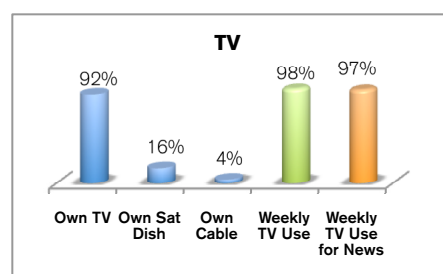
Total Population of Indonesia: 243.3 million

	Sample	VOA Weekly Audience
Sex	%	%
Male	50	59
Female	50	41
Age		
15-24	26	28
25-34	24	26
35-44	24	25
45-54	15	13
55-64	7	6
65+	4	3

	Sample	VOA Weekly Audience
Education	%	%
No Formal	3	2
Primary	36	21
Secondary	29	24
Senior	23	34
Vocational	6	11
University	3	9
Ethnicity/Nationality		
Javanese	46	40
Sundanese	17	28
Other	37	32

	Sample	VOA Weekly Audience
Residence	%	%
Urban	45	60
Rural	55	40
Language		
Javanese	38	30
Bahasa Indonesian	20	29
Sundanese	14	23
Other	28	18

M E D I A U S E



Top Ten Media Outlets

1. RCTI
2. SCTV
3. Indosiar
4. TPI
5. Trans TV
6. Trans 7
7. Anteve
8. TV One
9. Global TV
10. Metro TV

Top Ten Sources of News

1. RCTI
2. SCTV
3. Metro TV
4. TV One
5. Indosiar
6. Trans TV
7. TPI
8. Anteve
9. TVRI
10. Global TV

New Media Index Rankings

Overall Rank	33/54
Wired Rank	38/54
Mobile Rank	32/54

Web Analytics

Weekly Visitors	12,551
Weekly Visits	18,755

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: FREE in 2010**
- **Economist Intelligence Unit Instability: HIGH RISK (6.8) in 2009/2010**
- Indonesia has the world's largest Muslim population and is the world's third-largest democracy. The president, Susilo Bambang Yudhoyono, is trying to pursue policy reforms after comfortably winning reelection in July 2009, but his reformist agenda is encountering resistance from vested interests, according to the latest Economist Intelligence Unit report of June 2010.
- Real GDP is expected to expand by 5.6% by the end of 2010, according to the Economist. Economic growth will be driven mainly by private consumption and investment. Indonesia's economic performance during the global financial crisis was strong, providing political stability to the country.
- President Yudhoyono's government does not have an easy job despite its parliamentary majority. The coalition government is threatened by conflicts around certain reform issues, personal rivalries, and corruption scandals.
- Terrorism continues to be a serious threat in Indonesia. In 2010, multiple terrorism suspects have been arrested in Jakarta and other parts of Java. Although police have had enormous success (receiving lots of international press attention), raids have served to highlight the growing reach of terrorist organizations in the country.

Media Environment

- **Freedom House Press Freedom Index: PARTLY FREE (107/196) in 2010**
- **Reporters Without Borders Index: 28.50 (100/175) in 2009**
- Television dominates the media landscape in Indonesia. There are more than 10 private national television networks that operate in competition with the publicly owned Televisi Republik Indonesia (TVRI)—until 1989, TVRI was the only television station in the country. Besides these national networks, there are more than 100 local television stations. In addition, there are hundreds of illegal television stations operating without a government license. In contrast to television, household radio ownership has been declining since 2006.
- Official censorship of mass media content is rare. However, journalists in Indonesia continue to suffer violence and intimidation when they cover corruption or other sensitive topics. 'Envelope journalism' (a colloquial term used to describe bribery and blackmailing) continues to be a popular practice in business and government circles.
- There is a new broadcast regulation that reportedly came into effect in February 2007 to prevent the direct relay of foreign broadcast content by local private radio and television stations, though there is no evidence that this new regulation is currently enforced. Local television stations have taken preemptive precautions by airing only pre-recorded foreign broadcast news. However, radio stations have continued airing live VOA programs.
- Mobile telephony continues to be the most popular new technology in Indonesia. As in other South East Asian countries, mobile telephone ownership is much more widespread and expands at a more rapid pace than do computer ownership and Internet subscriptions. The urban-rural divide in mobile telephone ownership is slowly closing.
- While Internet usage remains higher in urban areas, the Internet-using population doubled among virtually all demographic groups over the past year, and mobile phones are now tied with Internet cafes as the most common means of going online.



Broadcasting
Board of
Governors

PROFILE



Languages of Broadcast: Kazakh, Russian

Content: 8.25 hrs. of original and 6 hrs. of repeat radio programming per hour; Internet

Distribution: 1 affiliate (1 MW & UKW), 2 IBB SW frequencies

RFE/RL's delivery includes 1 UKV affiliate in 3 cities, multiple SW frequencies, Yamal, AsiaSat, and complete bi-lingual Kazakh and Russian web sites with streaming audio.

Staff: 9

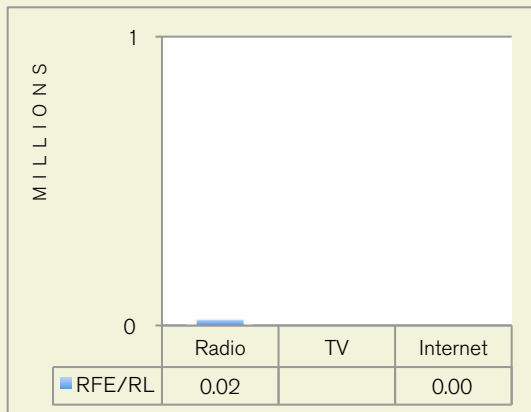
Budget: \$1,870,000

Established: 1953 to present



PERFORMANCE DATA (Using Data from Kazakhstan, December 2009)

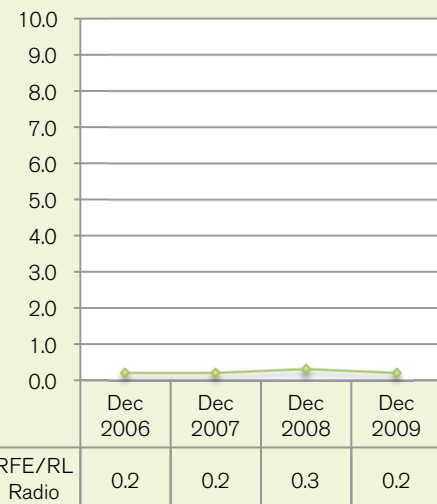
Audience Size



Weekly Reach (%) by Media

RFE/RL	
Radio	0.2
TV	na
Internet	< .1
Total	0.2

Weekly Reach %



Awareness (%)

RFE/RL	
	5

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)*

RFE/RL	
Radio	na
TV	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)*

RFE/RL	
Current Events	na
Current Events in Kazakhstan	na
U.S. Policies	na

Quality

Combined Scores from audience panel

RFE/RL	
Radio	3.0
Internet	3.6

* Sample of weekly RFE/RL listeners is too small for meaningful analysis.

Data are from a December 2009 nationwide survey of adults (15+) in Kazakhstan.

Kazakh Broadcasting

Total Population of Kazakhstan: 15.9 million

A U D I E N C E C O M P O S I T I O N

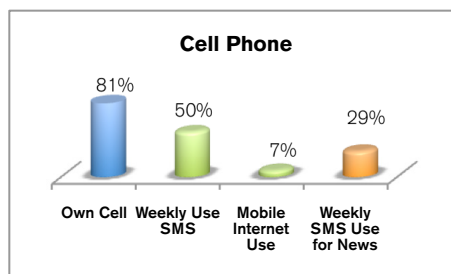
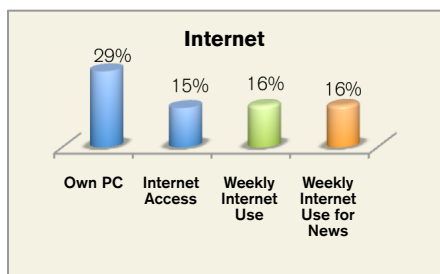
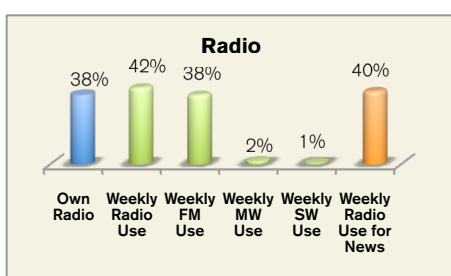
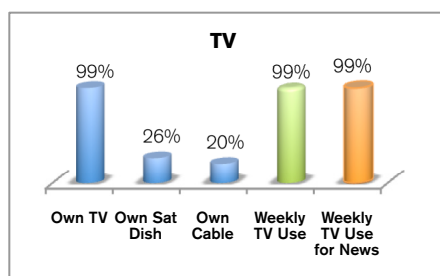
	Sample	RFE/RL Weekly Audience*
Sex	%	%
Male	47	na
Female	53	na
Age		
15-24	25	na
25-34	21	na
35-44	19	na
45-54	17	na
55-64	9	na
65+	10	na

	Sample	RFE/RL Weekly Audience*
Education	%	%
Illiterate/No Formal	1	na
Elem./Inter.	27	na
Secondary	53	na
Coll./Univ.	19	na
Ethnicity/Nationality		
Kazakh	55	na
Russian	32	na
Other	13	na

	Sample	RFE/RL Weekly Audience*
Residence	%	%
Urban	55	na
Rural	45	na
Language		
Kazakh	47	na
Russian	49	na
Other	4	na

* Sample of weekly RFE/RL listeners is too small for meaningful analysis.

M E D I A U S E



Top Ten Media Outlets

1. ORT-1
Kanal Evraziya
2. Khabar
3. Kazakhstan-1
4. EL Arna
5. KTK
6. NTV
7. NTK
8. 31 Kanal
9. Ren TV
10. Rossia

Top Ten Sources of News

1. ORT-1
Kanal Evraziya
2. Khabar
3. Kazakhstan-1
4. KTK
5. NTV
6. Other
7. El Arna
8. www.mail.ru
9. Russkoe Radio
10. Evropa Plus

New Media Index Rankings

Overall Rank	24/54
Wired Rank	28/54
Mobile Rank	15/54

Web Analytics

Weekly Visitors	28,923
Weekly Visits	77,271

C O N T E X T



Stability



Political Freedom



Press Freedom



Ease of Distribution



Competition

Political Situation

- **Freedom House Political Freedom Index: NOT FREE in 2010**
- **Economist Intelligence Unit Instability: MODERATE RISK (4.8) in 2009/2010**
- Kazakhstan exhibits all the characteristics of a strong authoritarian state. The past year was characterized by complete consolidation of the president's control over Kazakhstani internal affairs. The government used arbitrary arrests and fraudulent court cases against opposition leaders and journalists.
- Kazakhstani law prohibits the formation of political parties based on religion, ethnicity, or gender. Minorities continue to suffer discrimination, with a significant lack of political power or access. Nepotism and political corruption further exacerbate the problems.
- An uneven distribution of wealth and political access leaves the most vulnerable populations – women and migrant workers – the least protected in terms of access to employment, public and medical services, and vulnerable to at-work and domestic violence.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (169/196) in 2010**
- **Reporters Without Borders Index: 49.67 (142/175) in 2009**
- Before taking the Organization for Security and Co-operation in Europe chairmanship, Kazakhstan adopted new media laws that further restrained the already highly censored Kazakhstani media market. The two most damaging laws are the new regulations of the Internet and the legal immunity of private life; both restraining the criticism of public authorities.
- The past year saw few changes in Kazakhstan's media use patterns for following current events. TV, friends and family, and newspapers remain the top-three sources of news and information on a weekly basis. Radio use is quickly declining with listening rates dropping below five percent at any given time during the day.
- The Kazakhstani government and state-run media outlets are claimed as the most trusted institutions in the country with 80 and 74 percent relying on those, respectively. By contrast, only 47 percent say they trust independent media sources. The hostility of the Kazakhstani media environment is augmented by the domination of Russia-originated media outlets.
- The 2009 survey suggested a plateau in Internet use and access, but also showed a growing interest in quality Kazakh-language content. Cell phone penetration is high; and over one quarter of Kazakhstanis use their mobile phones for news and information.
- In the fall of 2008, RFE/RL's Kazakh Service transitioned to a new strategy that placed primary importance on its Internet platform, continuing radio programming for one hour in the evening, with a repeat in the morning. After only a little more than one year following the restructuring and re-launch of the site, the Service received an award for General Excellence in Online Journalism in the "Non-English, Small Site" category by the San Francisco-based Online News Association (ONA) in October 2009.

PROFILE



Language of Broadcast: Khmer

Content: 10.5 hrs. of original radio programming and 1 hr. of original TV programming per week; Internet

Distribution: 5 affiliates (3 FM, 2TV) 1 IBB MW & 3 SW frequencies

TV: VOA Khmer programming is carried 4 days a week on the Cambodian Television Network (CTN), Cambodia's No. 1 TV station, and 5 days a week on Television Kampuchea (TVK), Cambodian national television.

Radio: VOA Khmer produces 2 radio broadcasts 7 days a week: 60 minutes in the evening (local time), and 30 minutes in the morning.

Staff: 12

Budget: \$1,792,000

Established: 1955 to 1957; 1962 to present



Language of Broadcast: Khmer

Content: 14 hrs. of original radio programming per week; Internet

Distribution: RFA is found on 3 affiliates (3 FM), 2 IBB SW frequencies; Satellite rebroadcasting.

RFA is carried daily on Beehive FM, a popular source of news in Phnom Penh.

Staff: 13

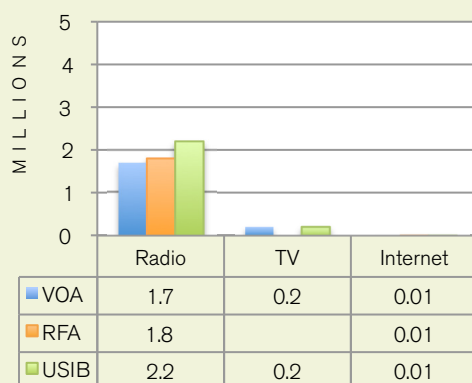
Budget: \$1,635,000

Established: 1997 to present



PERFORMANCE DATA (Using Data from Cambodia, September 2009)

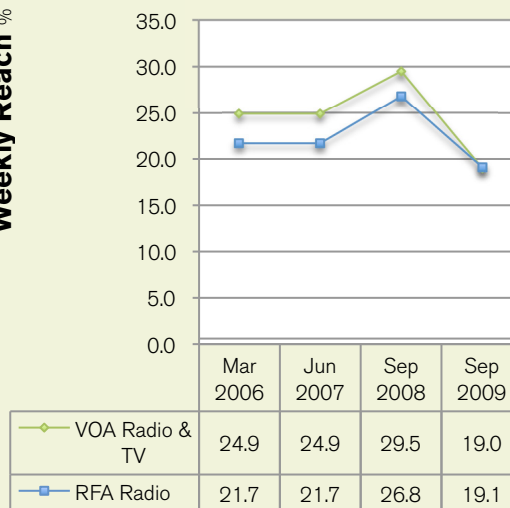
Audience Size



Weekly Reach by Media (%)

	VOA	RFA	USIB
Radio	17.6	19.1	22.7
TV	2.3	na	2.3
Internet	0.1	0.1	0.1
Total	19.0	19.1	23.8

Weekly Reach %



Awareness (%)

VOA	RFA
64	71

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

	VOA	RFA
Radio	94	92
TV	86	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

	VOA Radio*	RFA
Current Events	83	87
U.S. Culture (VOA) or Current Events in Cambodia (RFA)	42	na
U.S. Policies	38	na

Quality

Combined Scores from audience panel

	VOA	RFA
Radio	3.6	3.4
TV	3.6	na

*Understanding ratings for VOA TV are 67% for Current Events, 23% for U.S. Culture and 18% for U.S. Policies.

Data are from a September 2009 nationwide survey of adults (15+) in Cambodia.

Khmer Broadcasting

Total Population of Cambodia: 14.8 million

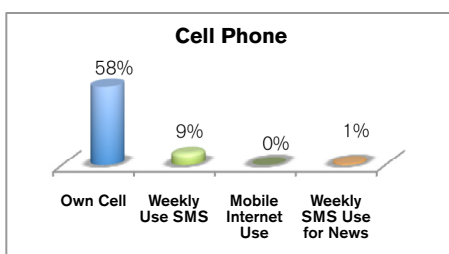
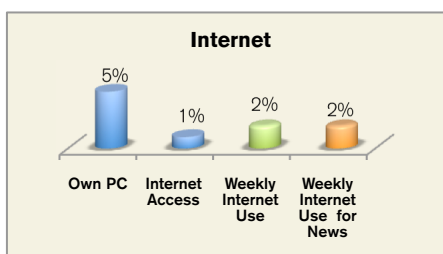
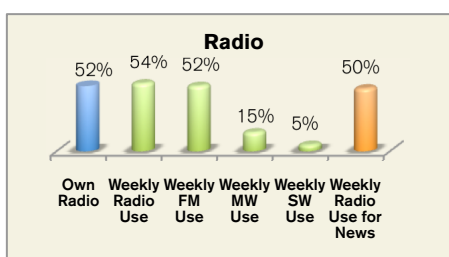
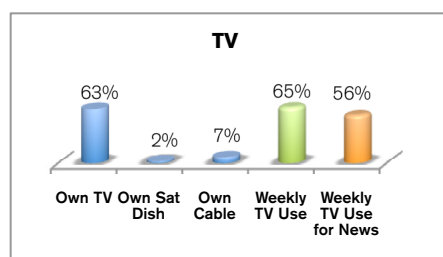
A U D I E N C E C O M P O S I T I O N

	Sample	VOA Wkly. Aud.	RFA Wkly. Aud.
Sex	%	%	%
Male	48	66	68
Female	52	34	32
Age			
15-24	28	20	23
25-34	24	20	22
35-44	19	23	22
45-54	13	16	15
55-64	9	14	11
65+	6	7	7

	Sample	VOA Wkly. Aud.	RFA Wkly. Aud.
Education	%	%	%
No formal	22	12	11
Primary	43	46	41
Secondary	34	38	41
Coll./Univ.	2	5	6
Ethnicity/Nationality			
Khmer	97	98	98
Vietnamese	1	0	0
Other	2	2	2

	Sample	VOA Wkly. Aud.	RFA Wkly. Aud.
Residence	%	%	%
Urban	20	24	27
Rural	80	76	73
Language			
na			

M E D I A U S E



Top Ten Media Outlets

1. CTN
2. TV 5
3. TV 27
4. TVK
5. TV 9
6. TV 3
7. TV 11 Apsara
8. FM103 Phnom Penh
9. FM 95 Bayon 21
10. FM105 Beehive

Top Ten Sources of News

1. CTN
2. TV 5
3. Bayon TV
4. TVK
5. RFA
6. VOA
7. FM103 Phnom Penh
8. TV 9
9. FM 95 Bayon 21
10. FM 105 Beehive

New Media Index Rankings

Overall Rank 54/54
Wired Rank 44/54
Mobile Rank 53/54

Web Analytics

VOA
Wkly. Visitors 6,737
Wkly. Visits 30,946
RFA
Wkly. Visitors 23,759
Wkly. Visits 94,753

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: NOT FREE in 2010**
- **Economist Intelligence Unit Instability: VERY HIGH RISK (8.0) in 2009/2010**
- Reflecting the increasingly repressive nature of the current regime, in the 2009 BBG survey less than half of Cambodian adults (45 percent) believe "people like them" are free to discuss political opinions openly and 69 percent believe that official corruption is the biggest problem in Cambodia today.
- Under Prime Minister Hun Sen the Cambodian Peoples' Party (CPP) has continued to consolidate its political power. There is little separation of powers with the legislature and judiciary weak relative to the executive. Public confidence in the court system and the police remain low. The Cambodian government has attempted to silence critics through the use of laws and detention.
- With regard to the high profile Khmer Rouge trials, Cambodian citizens remain divided. Thirty-two percent of Cambodians believe the trials are a waste of money and resources, while 35 percent believed they are worth the cost. Despite disagreements over the trials, most Cambodians (83 percent) believe it is important to understand the history of the Khmer Rouge period.
- Chinese military aid to Cambodia has increased in recent months after the US suspended a military aid program to Cambodia in response to the Cambodian government's decision to return 20 asylum seeking Uyghurs to China.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (134/196) in 2010**
- **Reporters Without Borders Index: 35.17 (117/175) in 2009**
- In 2009 press freedom in Cambodia continued to backslide. While Cambodia still enjoys more media freedom than neighboring Vietnam and Laos, Freedom House's most recent Freedom of the Press Index reduced its status from "partly free" to "not free" as violence against journalists has increased. As the domestic media becomes more restricted, the role of international media as sources of news and information is even more vital.
- The FM radio market, particularly in the capital of Phnom Penh, has become increasingly competitive. There are at least 54 radio stations operating in Cambodia with approximately 30 broadcasting in the capital, Phnom Penh. The majority of stations both in Phnom Penh and beyond broadcast on FM.
- However, in line with the increasing strength of the CCP and declining media freedom, most domestic radio stations are under strong government control. Many, including FM 96, FM 97, FM 98, FM 99 and FM 103 are perceived as affiliated with Cambodian People's Party, the major ruling party. There are however, local stations such as FM 90, FM 93.5 and Radio Beehive FM 105 that are believed to support opposition parties (FUNCINPEC, the junior party in the government, or the Sam Rainsy Party). Much of the decline in USIB audiences in Cambodia appears to be due to falling audiences for the major affiliate, Radio Beehive, although VOA and RFA remain two of the most widely heard international stations in Cambodia.
- Internet penetration in Cambodia is still extremely limited and Internet cafes are the most frequent point of access for Internet. Although Internet cafes are beginning to appear in ever more far-flung provincial towns, Internet use is still largely confined to the capital and a few larger cities such as Siem Reap and Battambang.
- Mobile phone access and ownership is growing rapidly in Cambodia –access increased 11 percent in between 2008 and 2009. After the repeal of a ban, many telecom providers in Cambodia are now offering 3G and data services to subscribers.



PROFILE



Language of Broadcast: Korean

Content: 29 hrs. of original and 6.5 hrs. of repeat radio programming per week; Internet

Distribution: 2 MW, 7 IBB SW frequencies

VOA Korean broadcasts on 2 MW (AM) transmitters, one in South Korea and one in far eastern Russia, near the northern North Korean border. In addition, VOA Korean broadcasts from shortwave transmitters in the Philippines, Thailand, and Russia. It also has an Internet site and a multimedia mobile website.

Staff: 21

Budget: \$4,242,000

Established: 1942 to present



Radio Free Asia



Language of Broadcast: Korean

Content: 24.5 hrs. of original and 10.5 hrs. of repeat radio programming per week; Internet

Distribution: RFA is found on 3 SW frequencies; Satellite rebroadcasting

Staff: 22

Budget: \$3,654,000

Established: 1997 to present



PERFORMANCE DATA (Using Data from Sample of North Korean Refugees, August 2009)*

Audience Size

MILLIONS

Data are from a convenience sample of 250 North Korean refugees and travelers in China and cannot be used to project audience size within the North Korean Population.

	Radio	Internet
VOA		
RFA		
USIB		

Weekly Reach by Media (%) **

	VOA	RFA	USIB
Radio	19.6	22.0	22.8
TV	na	na	na
Internet	1.2	1.6	1.6
Total	19.6	22.0	22.8

Weekly Reach %

Data are from a convenience sample of 250 North Korean refugees and travelers in China and cannot be used to project audience size within the North Korean Population.

VOA Radio & TV	
RFA Radio	
BBC Radio	

Awareness (%)

VOA	RFA
28	24

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

	VOA	RFA
Radio	na	na
TV	na	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

	VOA	RFA
Current Events	na	na
U.S. Culture (VOA) or Current Events in Region (RFA)	na	na
U.S. Policies	na	na

Quality

Combined Scores from audience panel

	VOA	RFA
Radio	3.1	3.1
TV	na	na

*Data are from a non-probability sample of North Korean travelers and refugees in the PRC and cannot be used to project audience size or for trend analysis.

**Weekly reach figures are for listening while in North Korea; 15.2% reported listening to RFA and 12.4% to VOA while in transition. Media use data reflect while respondents were in North Korea.

Data are from an August 2009 non-probability sample of North Korean travelers and refugees in the PRC.

Korean Broadcasting

Total Population of North Korea: 22.8 million

A U D I E N C E C O M P O S I T I O N

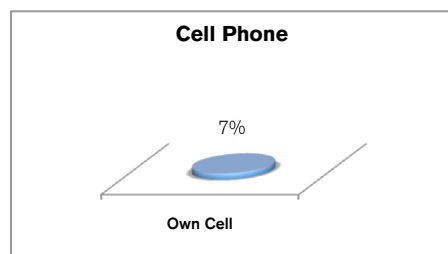
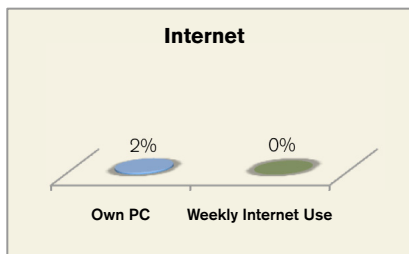
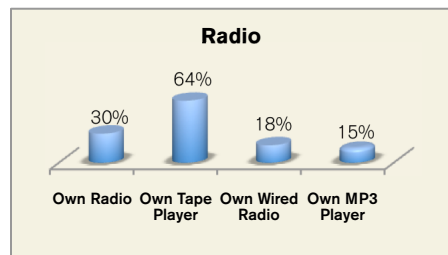
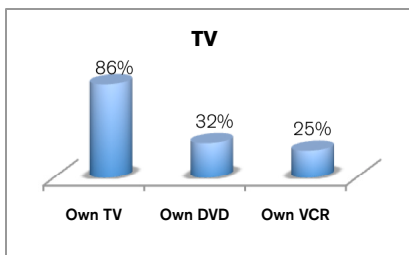
	Sample	VOA Weekly Aud.**	RFA Weekly Aud.**
Sex	%	%	%
Male	40	53	51
Female	60	47	49
Age			
15-24	2	2	4
25-34	22	25	24
35-44	50	41	42
45-54	20	25	24
55-64	6	8	7

	Sample	VOA Weekly Aud.**	RFA Weekly Aud.**
Education	%	%	%
Elementary	0	0	0
Mid-high	88	96	98
Coll./Univ.	11	4	2
Ethnicity/Nationality			
na	na	na	na

	Sample	VOA Weekly Aud.**	RFA Weekly Aud.**
Residence	%	%	%
Urban	6	6	4
Rural	20	0	0
Semi-urban	74	94	96
Language			
na	na	na	na

**Weekly reach figures are for listening while in North Korea; 15.2% reported listening to RFA and 12.4% to VOA while in transition. Media use data reflect while respondents were in North Korea.

M E D I A U S E **



Most Important Sources of Information

1. Friends and relatives
2. Chinese TV
3. Chinese merchants/smugglers
4. Domestic TV
5. South Korean radio
6. Foreign radio in Korean
7. North Korean radio

New Media Index Rankings

Overall Rank	na/54
Wired Rank	na/54
Mobile Rank	na/54

Web Analytics

VOA	
Wkly. Visitors	na
Wkly. Visits	na
RFA	
Wkly. Visitors	3,095
Wkly. Visits	6,495

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: NOT FREE in 2010**
- **Economist Intelligence Unit Instability: VERY HIGH RISK (7.7) in 2009/2010**
- North Korea remains one of the most closed and repressive societies in the world. The impoverished country suffered widespread famine in the 1990s, continues to struggle to feed people, and is largely dependent on Chinese economic assistance. Under the rule of Kim Jong-Il and the Korean Workers Party, serious and large-scale human rights abuses are common.
- An increasingly porous border with China has provided North Koreans with a greater window to the outside world than in the past, along with smuggled goods. Refugees describe a domestic environment of increasing disillusionment and despair, though this has not produced open protest.
- The apparently deteriorating health of North Korean leader Kim Jong-il has raised questions about regime stability and brought into focus the potential difficulty of leadership succession. In recent months Kim has begun a campaign to gain acceptance for his youngest son Kim Jong-eun as the country's next leader.
- Relations between North and South Korea remain very tense after an official investigation into the sinking of the South Korean naval ship "Cheonan" concluded that the vessel was sunk by a North Korean torpedo. In response, South Korea has suspended trade with the North, resumed psychological operations and is appealing to the UN and the international community to condemn North Korea's actions.
- North Korea launched its first nuclear weapon in 2006, and multi-lateral talks with China, the U.S. Japan, Russia and South Korea have failed to curb the country's nuclear program. It tested another nuclear weapon in May 2009.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (196/196) in 2010**
- **Reporters Without Borders Index: 112.50 (174/175) in 2009**
- The domestic media environment is restricted to a few official news sources, all of which serve as direct mouthpieces of the regime. Although the recently amended constitution provides for freedom of speech and freedom of the press, in reality citizens are banned from access to all outside sources of information on threat of stiff penalties, including detention in labor camps.
- North Korea ranks dead last, 195 out of 195, in Freedom House's Freedom of the Press Index. However, research suggests that despite harsh punishment for violators, the enforcement of media restrictions is inconsistent; many North Koreans seem willing to accept the risk to access outside information.
- An increasingly porous border with China, North Korea's chief trading partner, is allowing for greater inflow of media equipment and content – radios, TVs, and South Korean and Chinese DVDs are all sold in North Korea by Chinese traders. While still limited, illegal mobile phone ownership and use in border areas is for the first time making direct contact between ordinary North Koreans and those outside the country possible.
- The field of international radio broadcasters into North Korea has grown markedly over the last few years. At least four defector-run NGO broadcasts out of Seoul add to the field of stations sending Korean-language content to the North.
- Although impossible to quantify, it is clear that some North Koreans are listening to international radio. Among recent North Korean refugees international radio listening is a more common behavior than it was among earlier refugees.
- While discussing sensitive information in public is still very dangerous, it appears state social controls no longer to extend into the home or among close friends. As a result, word of mouth communication of outside information appears to be more common.

PROFILE



Language of Broadcast: Kurdish

Content: 21 hrs. of original and 7 hrs. of repeat radio programming per week; Internet

Distribution: 6 IBB FM, 1 MW, and 3 SW

Radio: VOA's Kurdish Service broadcasts three hours of radio programming 7 days a week. IBB FM transmitters in the Kurdish-populated cities of Sulaimaniya, Kirkuk, Mosul and Erbil carry all 3 hours daily. One hour per day is carried on IBB FM transmitters in Baghdad and Basra. One hour per day is repeated via the IBB MW frequency out of Kuwait.

Staff: 9

Budget: \$1,630,000

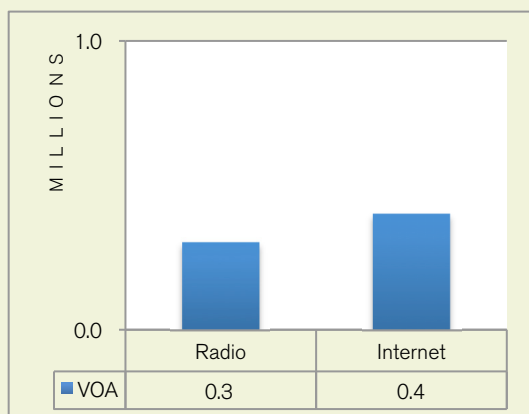
Established: 1992 to present



PERFORMANCE DATA

(Using Data from Iraq, February 2010)

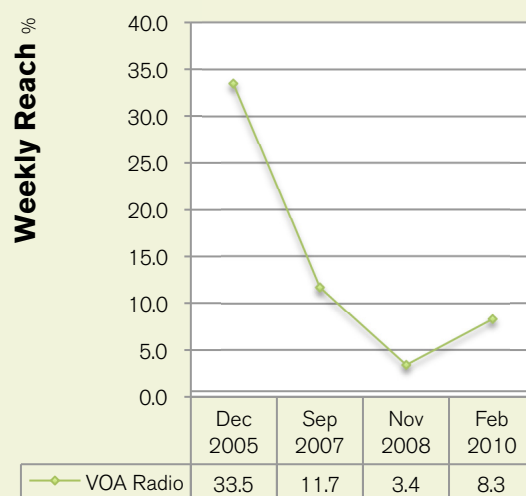
Audience Size*



Weekly Reach by Media (%) *

VOA	
Radio	8.3
TV	na
Internet	12.1
Total	17.9

Weekly Reach %



Awareness (%)

VOA	
Awareness (%)	83

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

VOA	
Radio	94
TV	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

VOA	
Current Events	41
U.S. Culture	50
U.S. Policies	59

Quality

Combined Scores from audience panel

VOA	
Radio	3.3
TV	na

*All weekly reach rates and audience estimates are based on the total sample of ethnic Kurds only.

Data are from a February 2010 nationwide survey of adults (15+) in Iraq with a booster sample of ethnic Kurds.

Kurdish Broadcasting

A U D I E N C E C O M P O S I T I O N

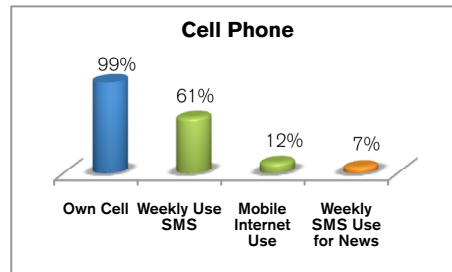
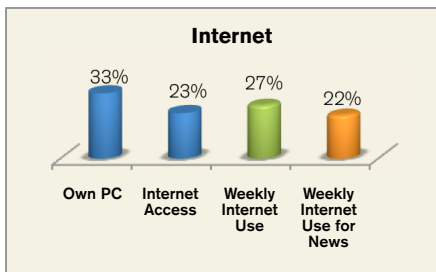
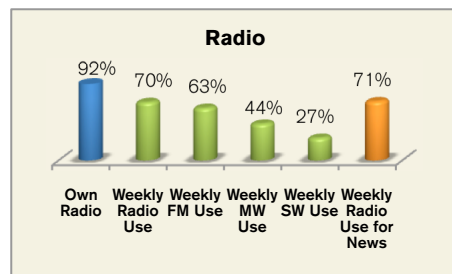
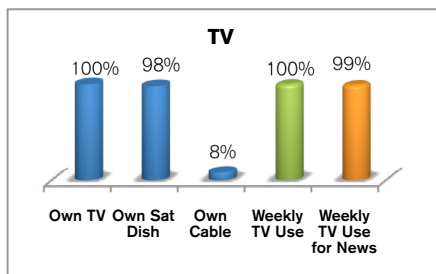
Total Population of Ethnic Kurdish population in Iraq: 3 million

	Sample	VOA Weekly Audience
Sex	%	%
Male	50	54
Female	50	46
Age		
15-24	28	34
25-34	26	27
35-44	21	20
45-54	14	10
55-64	10	7
65+	1	1

	Sample	VOA Weekly Audience
Education	%	%
Illiterate/ No Formal	26	19
Elem./Inter.	36	35
Secondary	18	18
Coll./Univ.	20	28
Ethnicity/Nationality		
na		

	Sample	VOA Weekly Audience
Residence	%	%
Urban	64	57
Rural	36	43
Language		
na		

M E D I A U S E



Top Ten Media Outlets

1. PDK TV
2. PUK TV
3. Zagros TV
4. Al Jazeera
5. Alhurra
6. Al Arabiya
7. Yekgirtu TV
8. MBC Action
9. MBC I
10. Al Sumeria/ IMN/ Kurdistan TV

New Media Index Rankings

Overall Rank	20/54
Wired Rank	32/54
Mobile Rank	3/54

Web Analytics

Weekly Visitors	1,263
Weekly Visits	3,093

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (Iraq): NOT FREE in 2010**
- **Economist Intelligence Unit Instability (Iraq): HIGH RISK in 2009/2010**
- Kurdish Iraqis have largely joined the central Iraqi government, yet difficulties and disagreements persist over rights to oil-rich Kurdish areas, such as Kirkuk. Kurds hope to hold a referendum on Kirkuk in order to adjoin the historically Kurdish city to the Kurdish autonomous region in Iraq.
- Iraqi general elections held in March 2010 helped Kurds secure 40 seats in the Iraqi parliament. Furthermore, Jamal Talabani will likely remain Iraq's ceremonial president; Talabani is the Kurdish leader and founder of the Patriotic Union of Kurdistan (PUK). With such heavy involvement in Iraq's central government, the Kurds of Iraq have fewer problems with their government than their Kurdish neighbors in Turkey and Iran.
- The Iraqi constitution (2005) recognizes Iraqi Kurdistan as a self-governing federal entity with Kurdish as its official language; along with Arabic, Kurdish is also the joint official language of Iraq.

Media Environment

- **Freedom House Press Freedom Index (Iraq): NOT FREE (144/196) in 2010**
- **Reporters Without Borders Index (Iraq): 53.30 (145/175) in 2009**
- In the past few years Kurdish media has advanced both in quality and quantity of channels, especially television for news and entertainment. Satellite television is widespread in Kurdish areas of Iraq and beyond where viewers primarily watch stations affiliated with Kurdish political movements. Many Iraqi Kurds also watch Arab satellite stations and local Iraqi channels.
- Kurdish Iraqis also listen to radio in large numbers, particularly Kurdish language stations. Although they look to radio and TV for news and information, TV is the favored source.
- Internet use has risen significantly in the Kurdish areas of Iraq, where users log on for news, communication, social networking and entertainment.



PROFILE



Language of Broadcast: Kyrgyz

Content: 25 hrs. of original and 25 hrs. of repeat radio programming per week; 1hr. of original and 1.25 hrs. of repeat TV programming per week; Internet

Distribution: 4 affiliates (4 FM), 2-3 IBB SW frequencies

RFE/RL's delivery includes 1 national UKV/FM network and 5 regional FM radio affiliates plus 1 national and 1 satellite TV affiliates carrying 2 weekly primetime programs; HotBird, AsiaSat, Yamal and Internet with streaming audio (Kyrgyz site with Russian sub site).

Staff: 9

Budget: \$1,901,000

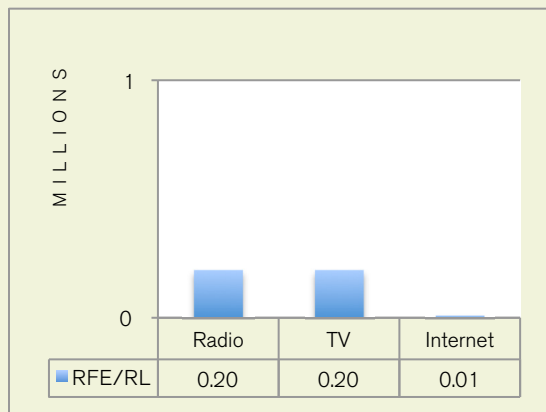
Established: 1953 to present



PERFORMANCE DATA

(Using Data from Kyrgyzstan, December 2009)

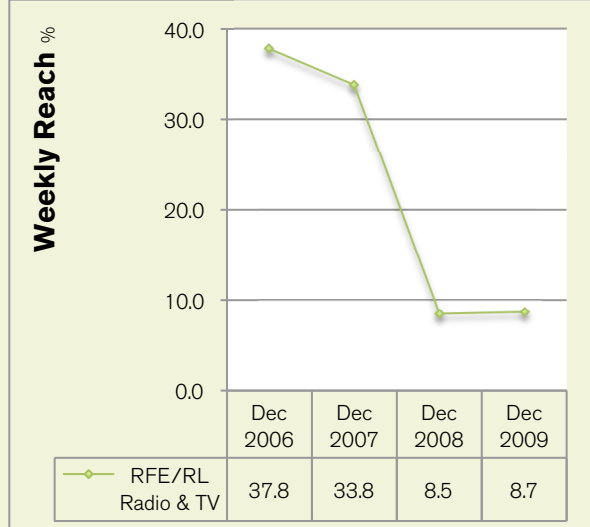
Audience Size



Weekly Reach by Media (%)

RFE/RL	
Radio	4.7
TV	5.0
Internet	0.1
Total	8.7

Weekly Reach %



Awareness (%)

RFE/RL	
	58

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

RFE/RL	
Radio	92
TV	93

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

RFE/RL Radio*	
Current Events	83
Current Events in Kyrgyzstan	85
U.S. Policies	na

Quality

Combined Scores from audience panel

RFE/RL	
Radio	3.3
TV	2.9

* Understanding ratings for RFE/RL TV are 89% for Current Events and 83% for Current Events in Kyrgyzstan.

Data are from a December 2009 nationwide survey of adults (15+) in Kyrgyzstan.

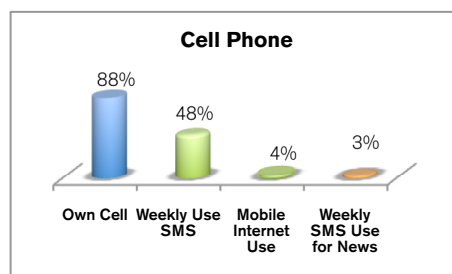
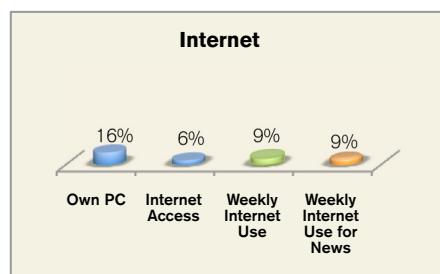
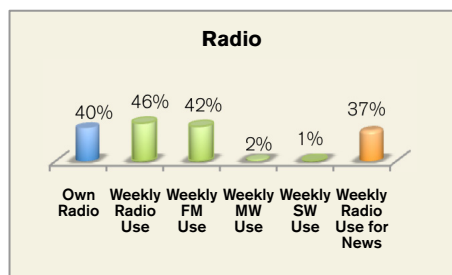
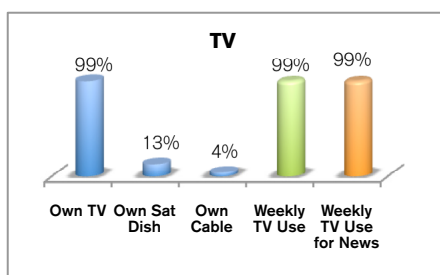
A U D I E N C E C O M P O S I T I O N

	Sample	RFE/RL Weekly Audience
Sex	%	%
Male	48	51
Female	52	49
Age		
15-24	29	23
25-34	22	24
35-44	20	17
45-54	15	16
55-64	9	14
65+	5	6

	Sample	RFE/RL Weekly Audience
Education	%	%
None/Primary	1	0
Secondary	56	49
Technical	24	24
Coll./Univ.	19	27
Ethnicity/Nationality		
Kyrgyz	69	89
Uzbek	13	6
Russian	11	1
Other	7	5

	Sample	RFE/RL Weekly Audience
Residence	%	%
Urban	35	30
Rural	65	70
Language		
Kyrgyz	67	89
Russian	18	5
Uzbek	13	5
Other	2	2

M E D I A U S E

**Top Ten Media Outlets**

1. ORT-1 Evraziya
2. UTRK (MTRK/KTR)
3. Rossiya (RTR)
4. ELTV (ELTR)
5. 5 Kanal
6. Uzbek TV
7. Piramida
8. STS
9. NTV
10. NBT

Top Ten Sources of News

1. ORT-1 Evraziya
2. UTRK (MTRK/KTR)
3. ELTR
4. 5 Kanal
5. RTR
6. SuperInfo
7. Uzbek TV
8. Kyrgyzstan Obondoru
9. *Vecherniy Bishkek*
10. NBT

New Media Index Rankings

Overall Rank	33/54
Wired Rank	34/54
Mobile Rank	18/54

Web Analytics

Weekly Visitors	14,062
Weekly Visits	64,069

C O N T E X T

**Political Situation**

- **Freedom House Political Freedom Index: NOT FREE in 2010**
- **Economist Intelligence Unit Instability: HIGH RISK (7.1) in 2009/2010**
- The political situation in Kyrgyzstan continues to be highly volatile. In April 2010, violent clashes in Bishkek resulted in the removal of President Kurmanbek Bakiyev from power and the installation of an interim government, led by former foreign minister Roza Otunbayeva.
- The uprising stemmed mainly from growing anger over Bakiyev's concentration of power, rising corruption, soaring cost of living and energy prices, and the closure of several media outlets.
- The subsequent political turmoil brought back old grievances between ethnic Kyrgyz and Uzbeks. The interim government appealed to the traditionally apolitical Uzbek community for support, thus raising tensions with the Kyrgyz.
- In mid-June 2010, ethnic clashes between Kyrgyz and Uzbeks in southern Kyrgyzstan broke out, leaving hundreds dead and some 400,000 displaced. Most of the victims were ethnic Uzbeks, a sizeable minority in the region. Tension between the two communities remain high.
- On June 27, 2010, the new constitution was passed by referendum. It introduces a parliamentary system that greatly reduces the power of the president. Parliamentary elections are scheduled for October 10, 2010, with President Otunbayeva set to remain in her position until December 2011.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (159/196) in 2010**
- **Reporters Without Borders Index: 40.00 (125/175) in 2009**
- In the five years of Kurmanbek Bakiyev's rule (2005-2010), Kyrgyzstan saw steady deterioration of media freedom. Independent journalists were continuously harassed by tax authorities, security offices and antimonopoly committee. The government has not issued a single broadcasting license since late 2006.
- International broadcasters such as RFE/RL and BBC were taken off the popular nationwide affiliates for a brief period but are now able to broadcast on main national frequencies.
- After April 2010, the media environment appeared to be improving. Many independent outlets and international broadcasters were able to get back on air. However, an outbreak of inter-ethnic violence in Osh in June 2010, mostly against the Uzbek minority, was accompanied by the destruction of the offices of Uzbek language TV stations, and other incidents involving intimidation of reporters. In general, Kyrgyz language media outlets have a tendency toward reporting a one-sided version of events, downplaying the Uzbek suffering. Independent outlets, such as the newspaper *Vecherniy Bishkek*, have been subject to threats.



PROFILE



Voice of America®



Language of Broadcast: Lao

Content: 3.5 hrs. of original radio programming per week; Internet

Distribution: 8 affiliates (8 FM), 2 IBB MW and SW frequencies

All Lao Service broadcasting is done from outside Laos. In addition to broadcasts on IBB facilities, the service's 8 radio affiliates are based in Thailand near the border with Laos. They broadcast the service's programming into Laos.

Staff: 6

Budget: \$810,000

Established: 1962 to present



Radio Free Asia



Language of Broadcast: Lao

Content: 14 hrs. of original radio programming per week; Internet

Distribution: RFA is found on 2 IBB SW frequencies,

The capital and other areas receive strong cross-border FM signals from affiliates in Northern Thailand; Satellite rebroadcasting

Staff: 14

Budget: \$1,533,000

Established: 1997 to present



PERFORMANCE DATA

(Using Data from Laos, February 2010)

Audience Size

MILLIONS

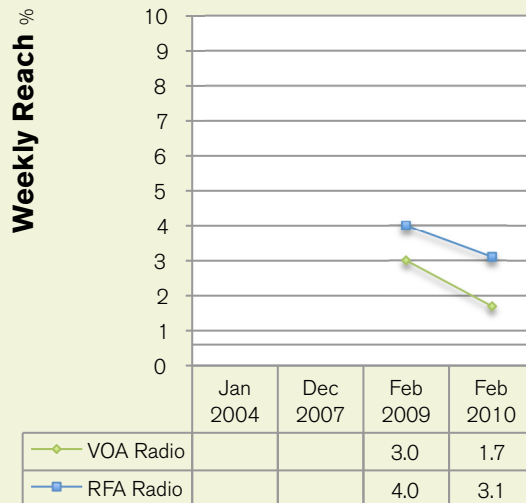
Audience figures are based on surveys conducted in politically repressive environments that are generally hostile to international broadcasting, particularly of domestic news coverage. Discouraged, and even prohibited by governments from listening to USIB programming, actual audience figures may be higher than cited.

	Radio	Internet
VOA	0.02	0.001
RFA	0.03	0.0
USIB	0.04	0.001

Weekly Reach by Media (%)

	VOA	RFA	USIB
Radio	1.7	3.1	3.5
TV	na	na	na
Internet	0.1	< .1	0.1
Total	1.8	3.1	3.6

Weekly Reach %



Awareness (%)

VOA	RFA
na	na

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)**

	VOA	RFA
Radio	na	na
TV	na	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)**

	VOA	RFA
Current Events	na	na
U.S. Culture (VOA) or Current Events in Laos (RFA)	na	na
U.S. Policies	na	na

Quality

Combined Scores from audience panel

	VOA	RFA
Radio	2.8	2.6
TV	na	na

*Due to differences in the sample areas and in weighting, trend data for the Laos surveys conducted before February 2009 are not available.

**Samples of VOA and RFA weekly listeners in the survey are too small for meaningful analysis.

Data are from a February 2010 survey of adults (15-64) in urban Laos. They are representative of the entire urban adult population only (about 27% of the total population of Laos).

Lao Broadcasting

Total Population of Laos: 6.3 million

A U D I E N C E C O M P O S I T I O N

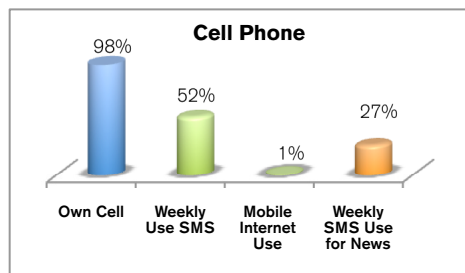
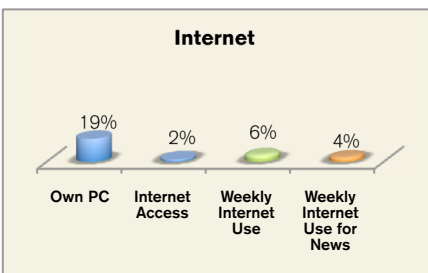
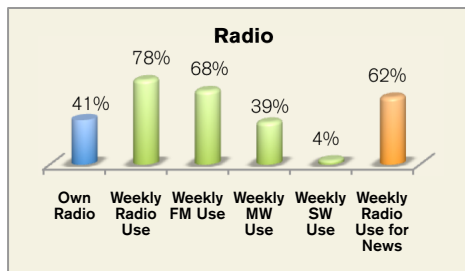
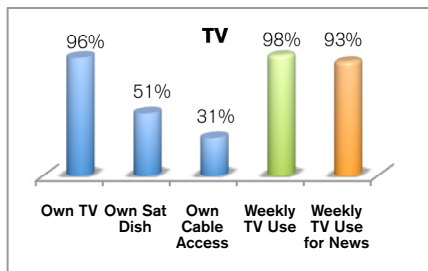
	Sample	VOA Weekly Aud.**	RFA Weekly Aud.**
Sex	%	%	%
Male	51	na	na
Female	49	na	na
Age			
15-24	37	na	na
25-34	23	na	na
35-44	17	na	na
45-54	11	na	na
55-64	12	na	na
65+	na	na	na

	Sample	VOA Weekly Aud.**	RFA Weekly Aud.**
Education	%	%	%
No formal	2	na	na
Primary	21	na	na
Secondary	47	na	na
Coll./Univ.	29	na	na
Ethnicity/Nationality			
Lao	92	na	na
Hmong	4	na	na
Other	4	na	na

	Sample	VOA Weekly Aud.**	RFA Weekly Aud.**
Residence	%	%	%
Urban	na	na	na
Rural	na	na	na
Language			
Lao	97	na	na
Hmong	2	na	na
Other	1	na	na

**Samples of VOA and RFA weekly listeners in the survey are too small for meaningful analysis.

M E D I A U S E



Top Ten Media Outlets

1. TV 7 (Thai) Channel
2. TV 5 (Thai)
3. TV 3 (Thai)
4. TV 9 (Thai) Channel
5. TV Lao National
6. TV Lao Channel 3
7. Provincial TV Station
8. Lao Star Channel
9. Local provincial radio stations
10. Lao National Radio

New Media Index Rankings

Overall Rank	40/54
Wired Rank	38/54
Mobile Rank	41/54

Web Analytics

VOA Weekly Visitors	1,584
Weekly Visits	6,102
RFA Weekly Visitors	3,151
Weekly Visits	8,389

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: NOT FREE in 2010**
- **Economist Intelligence Unit Instability: MODERATE RISK (7.8) in 2009/2010**
- Laos (officially Lao People's Democratic Republic, or Lao PDR) is a Communist one-party state. The country is currently transitioning from a centrally planned to a free market economy but reluctant to adopt any kind of democratic reform. In 2009, Freedom House highlighted Laos as one of the "worst of the worst" of the world's repressive regimes.
- The latest report of The Economist Intelligence Unit, published in June 2010, considers that there is "very little prospect that the ruling Lao People's Revolutionary Party (LPRP) will face any threat to its authority" in 2010-2011. One factor threatening stability is the displacement of Lao people from land contracted by Lao officials to foreign investors. After neighboring Thailand, China has the most marked influence over the country's economy.
- Laos has gradually implemented market liberalization moves since the announcement of the New Economic Mechanism in 1986. Bolstered by substantial amounts of international aid, timid liberalization has created an environment that is increasingly conducive to private sector activity and foreign investment.
- With 6 million people, and a majority living in rural areas, Laos has one of the lowest per capita incomes in South East Asia. Poverty is widespread. According to UNDP, 30 percent of the Lao population is under the national poverty line (considered as living with less than one dollar a day). Most of the population is devoted to subsistence farming.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (181/196) in 2010**
- **Reporters Without Borders Index: 92.00 (169/175) in 2009**
- Lao media are tightly controlled by the ruling Lao People's Revolutionary Party, in power since 1975. There is no freedom of the press and no legal protection for journalists, who are mostly employees of the Ministry of Information and Culture. News provided by the Lao media is limited in scope and content, and is mostly propagandistic or designed to disseminate political ideology. Many Lao people near border areas (including the capital, Vientiane) obtain news about the outside world through Thai media.
- Through foreign assistance, Lao National Television has recently built a new broadcasting center and upgraded its equipment and transmitter capacity. However, with its relatively limited resources, Lao National Television has been unable to compete with the multiple programming choices broadcast across the Mekong River.
- In 2002, the Lao Ministry of Information and Culture entered into a joint venture with a Chinese cable TV company and attempted to curb Thai TV dominance by establishing Lao Cable Television. It offers a selection of 30 foreign television channels, including BBC, CNN, CNBC, VOA TV, ABC Asia Pacific, MTV, Star Sports, plus Chinese, Vietnamese, Thai, Cambodian, Korean and other channels. Although satellite access is regulated, many use satellite dishes illegally.
- Laos has one of the lowest rates of Internet penetration in the region. As a result, RFA and VOA are hardly able to reach their audiences in Laos through the Internet, though past research suggests some impact among urban elites, particularly government officials.

PROFILE



Language of Broadcast: Macedonian

Content: 0.75 hrs. of original TV programming per week; Internet

Distribution: 10 affiliates (10 TV)

TV: The Service's *NewsFlash*, which is pre-recorded, is the only regular TV show by an international broadcaster available in Macedonia. It is carried by nationwide stations A2, Macedonian television and Channel 5, Tera regional TV, which covers central Macedonia, and a number of local stations throughout Macedonia. VOA also produces a weekly interactive program with A1 TV.

Web: Content updated daily, with video provided on YouTube and continuous updates on Facebook and Twitter accounts.

Staff: 2

Budget: \$449,000

Established: 1999 to present; TV service established in 2004



Language of Broadcast: Macedonian

Content: 7 hrs. of original radio programming per week, 0.5 hrs of original TV programming; Internet

Distribution: RFE/RL's delivery includes nationwide radio network Kanal 77 and 3 FM stations covering the country, plus 13 TV stations: including 1 national TV network; HotBird and Internet with streaming audio.

Staff: 17+

Budget: \$4,410,000+

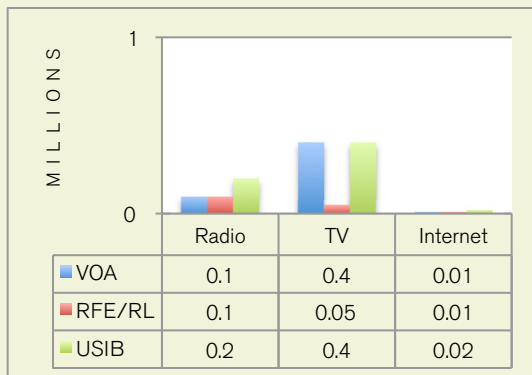
Established: 2001 to present

† Numbers reflect RFE/RL Balkna service totals which include Albanian, Bosnian, Macedonian, Montenegrin and Serbian.



PERFORMANCE DATA (Using Data from Macedonia, September 2009)

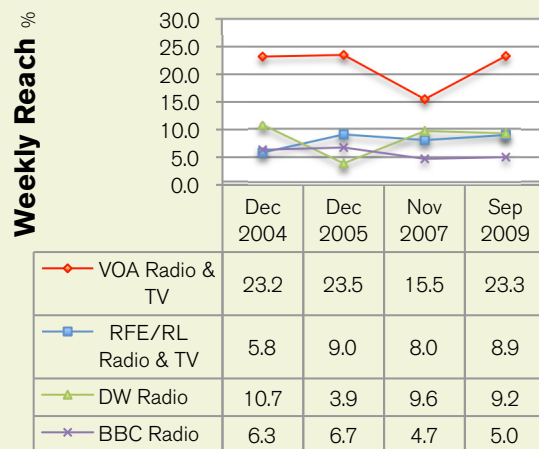
Audience Size



Weekly Reach by Media (%)

	VOA	RFE/RL	USIB
Radio	0.9	6.4	7.0
TV	22.2	2.8	23.1
Internet	0.9	0.8	1.3
Total	22.3	8.9	27.3

Weekly Reach



Awareness (%)

VOA	RFE/RL
58	51

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

	VOA	RFE/RL
Radio	92	99
TV	95	NA

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

	VOA TV*	RFE/RL
Current Events	91	94
U.S. Culture (VOA)/Current Events in Macedonia	73	96
U.S. Policies	75	na

Quality

Combined Scores from audience panel

	VOA	RFE/RL
Radio	3.4	3.2
TV	3.2	na

*Understanding ratings for VOA radio are 76% for Current Events, 85% for U.S. Culture and 70% for U.S. Policies.

Data are from a September 2009 nationwide survey of adults (15+) in Macedonia.

Macedonian Broadcasting

A U D I E N C E C O M P O S I T I O N

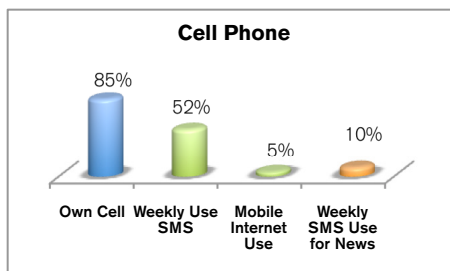
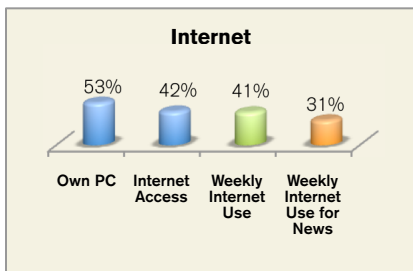
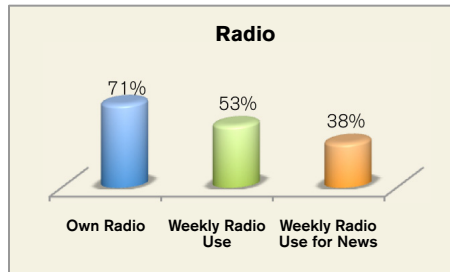
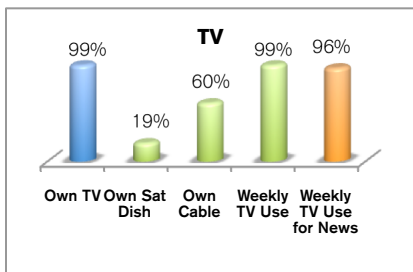
Total Population of Macedonia: 2.1 million

	Sam.	VOA Weekly Aud.	RFE/RL Weekly Aud.
Sex	%	%	%
Male	50	51	61
Female	50	49	39
Age			
15-24	21	14	16
25-34	19	19	21
35-44	17	20	18
45-54	19	21	24
55-64	12	14	10
65+	13	12	11

	Sam.	VOA Weekly Aud.	RFE/RL Weekly Aud.
Education	%	%	%
None	3	1	2
Primary	30	27	18
Secondary	6	4	5
Vocational	45	48	48
Coll./Univ.	17	20	26
Ethnicity/Nationality			
Macedonian	67	64	75
Albanian	23	28	8
Other	10	8	17

	Sam.	VOA Weekly Aud.	RFE/RL Weekly Aud.
Residence	%	%	%
Urban	57	59	61
Rural	43	41	39
Language			
Macedonian	71	67	82
Albanian	23	29	9
Other	6	4	9

M E D I A U S E



Top Ten Media Outlets

1. A1 TV
2. Sitel TV
3. Kanal 5 TV
4. Macedonian TV1
5. Telma TV
6. A2 TV
7. Alsat TV
8. TV Alfa
9. Discovery Channel
10. Antena 5

Top Ten Sources of News

1. A1 TV
2. Sitel TV
3. Kanal 5 TV
4. Alsat TV
5. Macedonian TV1
6. Vest
7. Vreme
8. Telma TV
9. Dnevnik
10. Google.com

New Media Index Rankings

Overall Rank	5/54
Wired Rank	1/54
Mobile Rank	15/54

Web Analytics

VOA Weekly Visitors	406
Weekly Visits	802
RFE/RL Weekly Visitors	4,768
Weekly Visits	9,541

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: PARTLY FREE in 2010**
- **Economist Intelligence Unit Instability: HIGH RISK (6.6) in 2009/2010**
- At the end of 2009 Macedonia's citizens were granted visa-free travel within the Schengen area. However, the country's aspirations to join the EU and NATO have been hampered by an ongoing name dispute with neighboring Greece. Greece argues that Macedonia's insistence on keeping its name implies territorial claims on the northern Greek region of Macedonia.
- In addition to gaining EU membership, the Macedonian government's priorities include fighting corruption and organized crime and fostering economic growth.
- However, the EU has recently criticized the Macedonian political parties for failing to reach common ground and work together to advance much-needed reforms, including in the judiciary and public administration.
- Relations between the majority Macedonians and the ethnic Albanians, which account for roughly one-fourth of the population, have been improving since 2001; the ethnic Albanian Democratic Union for Integration is a partner in the ruling coalition. However, the National Liberation Army, an armed Albanian group, has recently re-emerged and claimed that it is still active in all regions of Macedonia.

Media Environment

- **Freedom House Press Freedom Index: PARTLY FREE (94/196) in 2010**
- **Reporters Without Borders Index: 8.75 (34/175) in 2009**
- As in the other Balkan countries, the media market is overcrowded, with more than 200 TV and radio stations vying for a population of just over 2 million. In addition, the government last year granted 17 new satellite TV licenses. Media sources have further diversified with the growth of the Internet, extension of the cable networks through IPTV and the first DVB-T operator licensed in 2009.
- Local analysts, however, are worried about a downward trend in professional standards. Political interference in the licensing procedure is also a source of concern.
- The public broadcaster, Macedonian Radio-Television, is financed through the budget which makes it susceptible to influence by the government. Over the last few years the public broadcasting service has been losing audience in the face of stiff competition from private networks whose entertainment programs and reality shows are drawing an ever larger audience.
- Self-censorship is quite common, fed by continuing intimidation of journalists, government preferences for certain "friendly" media and the fact that Macedonia's legislation still treats defamation as a criminal offence. In general, media are perceived as biased politically and subject to pressures from the government and business interests.
- The press and, to a lesser degree, radio and television are divided along ethnic lines, with Macedonians following Macedonian-language content and Albanians opting for Albanian sources, including Albania- and Kosovo-based outlets.



PROFILE



Voice of America®



Language of Broadcast: Mandarin

Content: 92 hrs. of original radio programming per week; 7.25 hrs. of original and 1.25 hrs. of repeat TV programming per week; Internet

Distribution: 12 affiliates (4TV, 9 radio), TV via AsiaSat3, 6-8 IBB SW frequencies

TV: Eleven stations inside China take VOA Mandarin Service's programs for rebroadcast without branding or formal agreements; tracking is difficult because of the political environment. Service has four affiliates outside of China.

Radio: Seventy-eight stations inside China take Mandarin programs for rebroadcast without branding or formal agreements. Service has nine radio affiliates outside China.

Web: The Service has three separate websites, one with language learning and cultural content only. In addition, one mobile phone manufacturer inside China embeds VOA's application on millions of its phones for downloads of VOA Mandarin's English learning programs.

Staff: 76

Budget: \$12,744,000

Established: 1941 to present



Radio Free Asia



Language of Broadcast: Mandarin

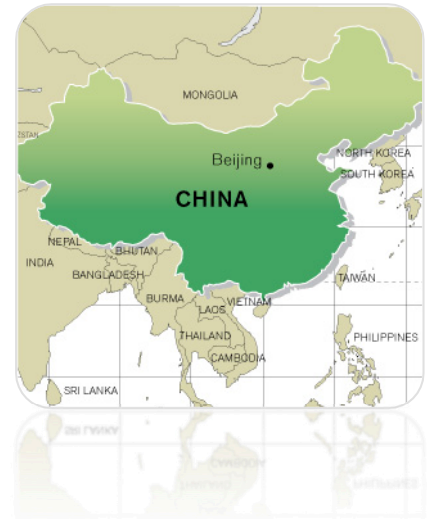
Content: 43.25 hrs. of original and 40.75 hrs. of repeat radio programming per week; Internet

Distribution: 6-11 IBB SW frequencies; Satellite rebroadcasting of RFA programming

Staff: 43

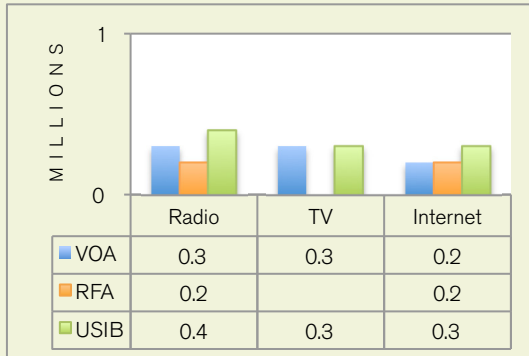
Budget: \$9,000,000

Established: 1996 to present



PERFORMANCE DATA (Using Data from China, November 2009)

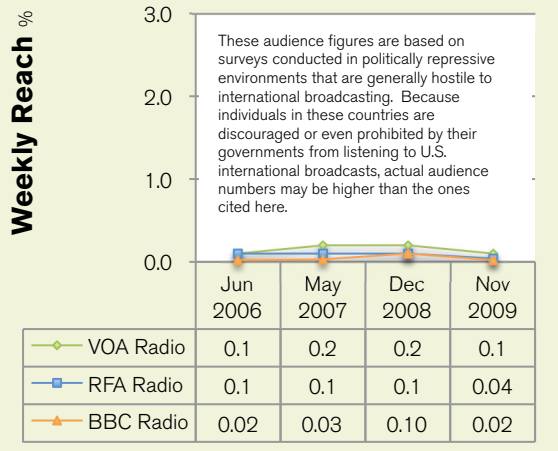
Audience Size



Weekly Reach by Media (%)

	VOA	RFA	USIB
Radio	<0.1	<0.1	<0.1
TV	<0.1	na	na
Internet	<0.1	<0.1	<0.1
Total	0.1	<0.1	0.1

Weekly Reach %



Awareness (%)

VOA	RFA
12	3

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%) *

	VOA	RFA
Radio	na	na
TV	na	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%) *

	VOA	RFA
Current Events	na	na
U.S. Culture (VOA) or Current Events in China (RFA)	na	na
U.S. Policies	na	na

Quality

Combined Scores from audience panel

	VOA	RFA
Radio	3.2	3.3
TV	na	na

*Samples of VOA and RFA weekly listeners in the survey are too small for meaningful analysis.

Data are from a November 2009 survey of adults (15+) in China.

Mandarin Broadcasting

Total Population of China: 1,338.1 million

A U D I E N C E C O M P O S I T I O N

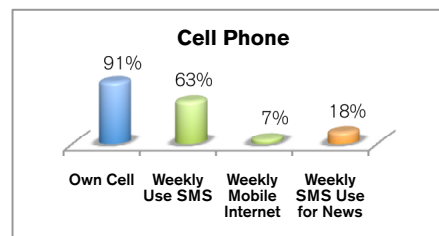
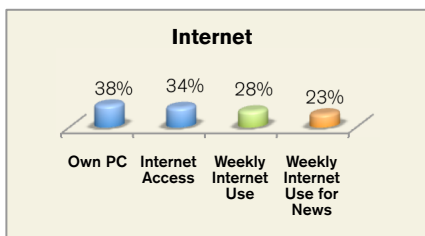
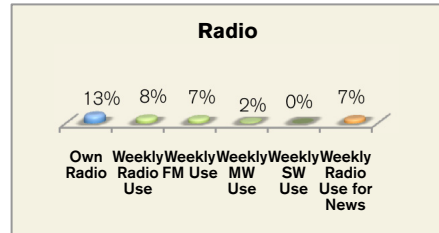
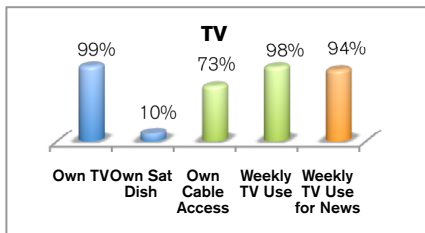
	Sam.	VOA Weekly Aud.*	RFA Weekly Aud.*
Sex	%	%	%
Male	50	na	na
Female	50	na	na
Age			
15-24	17	na	na
25-34	21	na	na
35-44	25	na	na
45-54	22	na	na
55-64	12	na	na
65+	16	na	na

	Sam.	VOA Weekly Aud.*	RFA Weekly Aud.*
Education	%	%	%
Prim. or less	22	na	na
Jr. School	40	na	na
High School	26	na	na
Vocational	8	na	na
Coll./Univ.	3	na	na
Ethnicity/Nationality			
Han	99	na	na
Other	1	na	na

	Sam.	VOA Weekly Aud.*	RFA Weekly Aud.*
Residence	%	%	%
Urban	45	na	na
Rural	55	na	na
Language			
Mandarin	85	na	na
Cantonese	14	na	na
Other	1	na	na

*Samples of VOA and RFA weekly listeners in the survey are too small for meaningful analysis.

M E D I A U S E



Top Ten Media Outlets

1. CCTV1
2. CCTV News
3. CCTV2
4. CCTV4
5. Phoenix TV (Chinese)
6. Provincial Radio
7. Sina.com
8. Phoenix TV (Info)
9. Local Radio
10. Sohu.com

Top Ten Sources of News

1. CCTV1
2. Provincial TV
3. Local TV
4. CCTV News
5. CCTV2
6. Local Press
7. CCTV4
8. CCTV12
9. CCTV5
10. Baidu.com

New Media Index Rankings

Overall Rank	13/54
Wired Rank	11/54
Mobile Rank	25/54

Web Analytics

VOA Wkly. Visitors	52,725
Wkly. Visits	154,711
RFA Wkly. Visitors	35,155
Wkly. Visits	66,535

C O N T E X T



Stability



Political Freedom



Press Freedom



Ease of Distribution



Competition

Political Situation

- **Freedom House Political Freedom Index: NOT FREE in 2010**
- **Economist Intelligence Unit Instability: MODERATE RISK (4.8) in 2009/2010**
- In spite of the recent global slowdown, Chinese economic growth has remained high. The State Department's annual human rights report includes reports of extrajudicial killings, executions without due process, forced confessions and torture. Still, dissatisfaction with severe restrictions on political participation and legal rights has not been reflected in public opinion surveys, where Chinese say they are satisfied with the direction of Chinese society.
- With a huge internal migrant population, overcrowding in major cities and massive job creation requirements, internal stability is the Chinese government's primary political concern. Recent labor strikes in Guangzhou showcase the kind of popular dissatisfaction the regime tries to control and limit. Grievances about land, housing, entitlements, the environment, or corruption also have led to protests and petitions. Lawyers representing aggrieved parties or cases deemed sensitive have faced harassment, disbarment and detention.
- Extreme tensions have arisen between the CCP and Chinese ethnic minorities in recent years, most visible in the form of harsh government crackdowns in response to unrest in Tibet and Xinjiang.
- Although China has become more "open" in some ways, social and media research remains an area where extreme caution is needed. International projects only occur with permission from the government after the research design has been inspected. The Chinese government has tried to tighten control of media and foreign investment in the media industry.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (181/196) in 2010**
- **Reporters Without Borders Index: 84.50 (168/175) in 2009.**
- US International broadcasters are among the most tightly censored media outlets in China. VOA and RFA radio broadcasts are intensively jammed and both broadcasters' websites are blocked in China. Such restrictions present serious obstacles to those in China attempting to access VOA and RFA content.
- China's media environment is evolving at an extremely rapid pace. Twenty-eight percent of Chinese adults access the Internet weekly. This represents a sevenfold increase since 2003. While new technologies are still used most commonly by young urbanites, they are quickly spreading to rural areas.
- Chinese are increasingly sophisticated in their online behavior. Blogs, podcasts, social networking sites and micro-blogs are becoming a normal part of many Chinese Internet users' online routines. However, China also leads the world in imprisoning bloggers and other cyber dissidents, so a certain level of self-censorship and indirect communication is common when discussing sensitive topics.
- Mobile phones have become one of the most widely owned and used media platforms in China, second only to television. This year's survey found that 80 percent of all Chinese adults (roughly 864 million people) use a mobile phone on a weekly basis, up from 74 percent in 2008.
- Although it has been less the two years since the introduction of mobile 3G networks in China, 7 percent of Chinese access the internet via mobile phone weekly, an increase from 5 percent in the 2008 survey. Mobile Internet access is not merely an urban phenomenon. In this year's survey, only 30 percent of mobile Internet users were urbanites, while 38 percent lived in villages.
- The proliferation of new equipment and platforms to access and share information has created extraordinary channels for copying and spreading information and for coordinating citizen activities, including popular protests. Viral videos, sensitive blogs and cell phone activism represent a challenge to Beijing, which has redoubled resources devoted to controlling new media. In addition to web monitoring and blocking, new regulations require cell phone owners to use official identification to purchase SIM cards.



PROFILE



Language of Broadcast: Serbian/Montenegrin, Bosnian and Croatian

Content: 10.5 hrs. of original and 7 hrs. of repeat radio programming; Internet (broadcast hours include both Serbian and Montenegrin programming)

Distribution: RFE/RL's delivery includes 11 FM affiliates covering the whole of Montenegro, in addition to HotBird and Internet with streaming audio.

Staff: 17+

Budget: \$4,410,000+

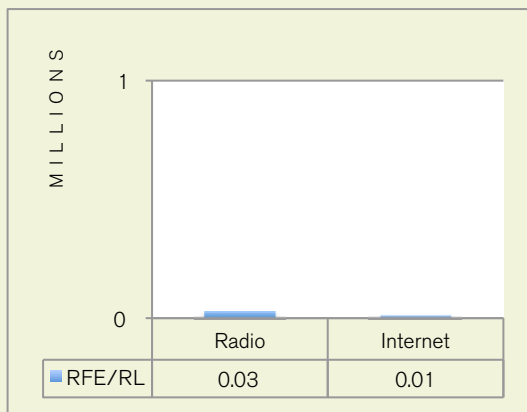
Established: 1994 to present

† Numbers reflect RFE/RL Balkans service totals which include Albanian, Bosnian, Macedonian, Montenegrin and Serbian.



PERFORMANCE DATA (Using Data from Montenegro, July 2009)

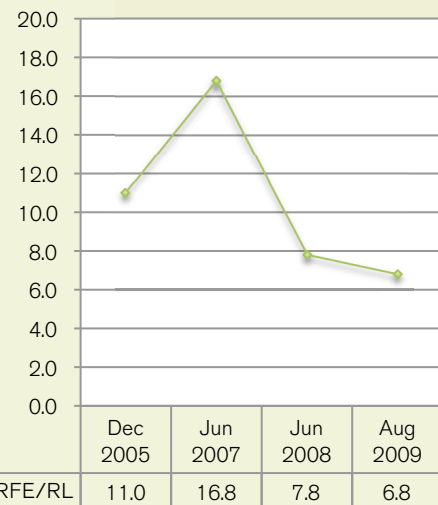
Audience Size*



Weekly Reach by Media (%)*

RFE/RL	
Radio	6.3
TV	na
Internet	0.7
Total	6.8

Weekly Reach %



Awareness (%)

RFE/RL	
	73

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

RFE/RL	
Radio	93
TV	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

RFE/RL	
Current Events	18
Current Events in Montenegro	21
Int'l Events that Affect Montenegro	23

Quality

Combined Scores from audience panel

RFE/RL	
Radio	3.4
TV	na

*VOA Serbian attracts a weekly total media audience of approximately 0.1 million in Montenegro, based on weekly reach of 22.6% (4.3% for radio, 21.6% for TV and 0.9% for Internet.)

Data are from a July 2009 nationwide survey of adults (15+) in Montenegro.

Montenegrin Broadcasting

A U D I E N C E C O M P O S I T I O N

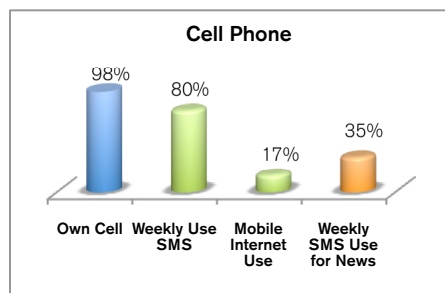
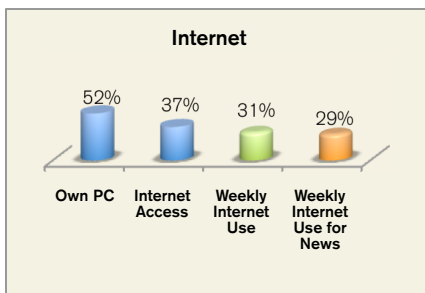
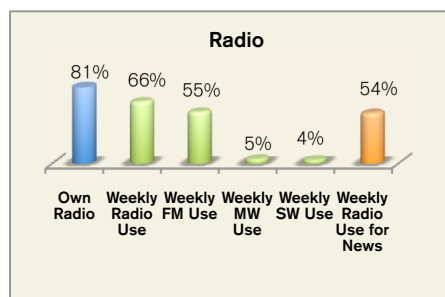
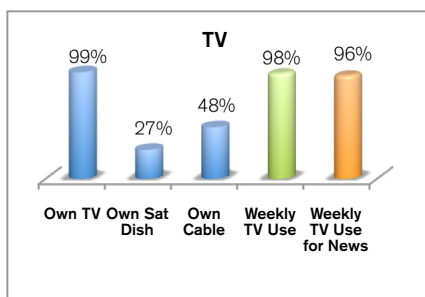
Total Population of Montenegro: 0.6 million

	Sample	RFE/RL Weekly Audience
Sex	%	%
Male	49	60
Female	51	40
Age		
15-24	19	18
25-34	22	16
35-44	14	15
45-54	17	15
55-64	20	28
65+	8	9

	Sample	RFE/RL Weekly Audience
Education	%	%
Elementary	24	26
Secondary	54	45
Higher	22	29
Ethnicity/Nationality		
Montenegrin	55	46
Serbian	28	29
Other	16	25

	Sample	RFE/RL Weekly Audience
Residence	%	%
Urban	62	54
Rural	38	46
Language		
Mon/Ser/Bos/Cro	94	96
Other	6	4

M E D I A U S E



Top Ten Media Outlets

1. TV Pink Montenegro
2. TV In
3. TV Crna Gore 1
4. TV Crna Gore 2
5. Atlas TV
6. TV Elmag
7. Radio Elmag
8. RTS 1,2
9. TV Montena
10. TV B92

Top Ten Sources of News

1. TV Crna Gore
2. TV In
3. Vijesti
4. Dan
5. Atlas TV
6. TV Elmag
7. Pobjeda
8. Radio Elmag
9. Vecernje novosti
10. Radio Podgorica

New Media Index Rankings

Overall Rank	1/54
Wired Rank	3/54
Mobile Rank	1/54

Web Analytics

Weekly Visitors	na
Weekly Visits	na

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: FREE in 2010**
- **Economist Intelligence Unit Instability: HIGH RISK (6.4) in 2009/2010**
- Montenegro has experienced strong economic growth since 2006 and attracted significant foreign investment, especially in tourism and infrastructure.
- However, as in all the former Yugoslav republics, corruption and organized crime remain a serious problem in Montenegro and the institutions responsible for fighting organized crime weak.
- In 2009 the Montenegrin government was accused of involvement in tobacco smuggling. Prime Minister Milo Djukanovic was indicted by an Italian court, but used his immunity to avoid prosecution.

Media Environment

- **Freedom House Press Freedom Index: PARTLY FREE (80/196) in 2010**
- **Reporters Without Borders Index: 17.00 (77/175) in 2009**
- The media market in Montenegro is overcrowded, with dozens of radio and TV stations catering to a population of less than 700,000. Most private media are unsustainable and struggling to survive; state-owned media enjoy government subsidies.
- The government continues to interfere in the work of media regulatory bodies such as the Agency for Telecommunications. The allocation of national broadcasting licenses in 2009 was particularly controversial with local experts arguing that the process favored pro-government broadcasters.
- The tendency towards self-censorship is aggravated by Montenegro's legislation treating libel as a criminal offence. The threat of excessive fines or imprisonment discourages journalists from criticizing politicians and government officials.



PROFILE



Voice of America®



Language of Broadcast: Pashto

Content: 6 hrs. of original TV programming per week; 84 hrs. of original radio programming per week; Internet. Radio Deewa airs 9 hours of live programming a week; Internet.

Distribution: 11 affiliates (10 FM, 1 MW); 8 IBB FM, 1 MW, and 2-3 SW frequencies

Radio Deewa: 1 IBB MW, 1 IBB FM, and 4 IBB SW frequencies

VOA Afghan's TV *Ashna* is carried throughout Afghanistan on state-owned RTA-6 evenings a week in Dari and Pashto. The services' radio content is on FM in 5 Afghan cities 7 days a week; AM & SW throughout the region.

Staff: 20

Budget: \$2,900,000

Established: 1982 to present



RadioFreeEurope
RadioLiberty



Language of Broadcast: Pashto

Content: To Afghanistan, 42 hrs. of original radio programming per week.

Distribution: 4 affiliates (4 FM); 8 IBB FM, 1 MW, and 2-3 SW frequencies, Satellite

Delivery includes 1 national MW, 8 IBB FM transmitters, multiple SW frequencies, HotBird, AsiaSat, Yamal and Internet with streaming audio (Dari site plus Pashto site).

Staff: 51 (30 on board)

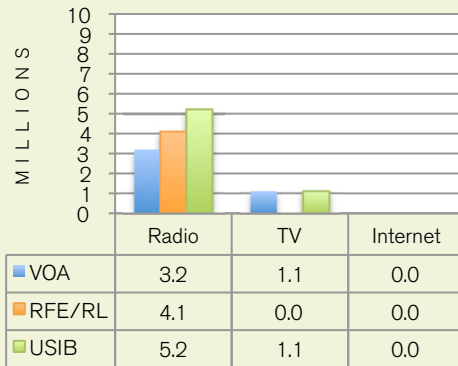
Budget: \$11,200,000 million

Established: 1985 to 1993; 2002 to present



PERFORMANCE DATA* (Using Data from Afghanistan, November 2009)

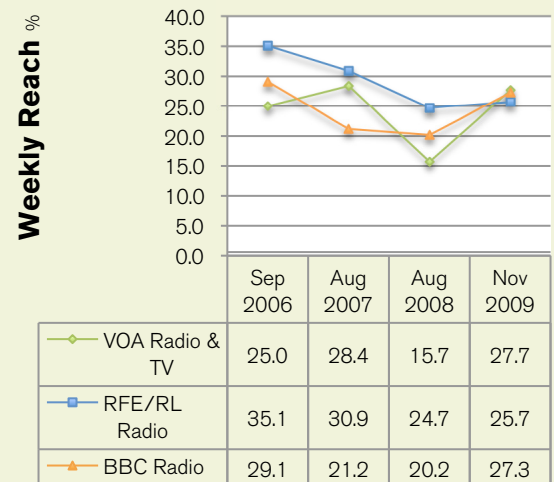
Audience Size



Weekly Reach by Media (%)

	VOA	RFE/RL	USIB
Radio	20.2	25.7	32.4
TV	6.9**	na	6.9**
Internet	< .1	< .1	< .1
Total	27.7	25.7	36.2

Weekly Reach



Awareness (%)

VOA	RFE/RL
56	60

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

	VOA	RFE/RL
Radio	88	88
TV	95	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

	VOA Radio***	RFE/RL
Current Events	67	86
U.S. Culture (VOA) or Current Events in Afghanistan (RFE/RL)	61	89
U.S. Policies	45	na

Quality

Combined Scores from audience panel

	VOA	RFE/RL
Radio	3.5	3.6
TV	na	na

Data are from a November 2009 nationwide survey of adults (15+) in Afghanistan.

*These tables and charts present Pashto audiences in Afghanistan only. A September 2009 survey of Pakistan's Federally Administrated Tribal Areas (FATA) indicated a weekly reach of 14.2% for VOA/Radio Deewa in Pashto. Weekly reach for RFE/RL's Radio Mashaal in Pashto will be measured for the first time in the 2010 surveys of Pakistan (both nationwide and FATA only).

**Viewing in "Pashto only" or "Dari and Pashto".

***Understanding ratings for VOA TV are 99% for Current Events, 77% for U.S. Culture and 67% for U.S. Policies.

Pashto Broadcasting

A U D I E N C E C O M P O S I T I O N

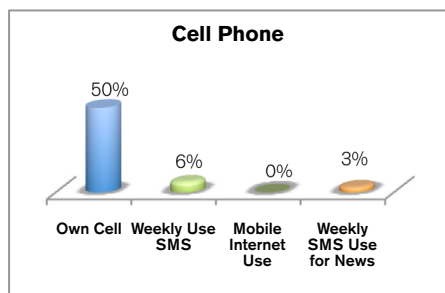
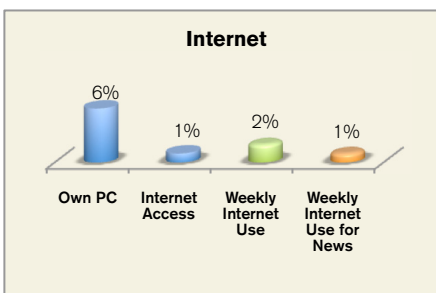
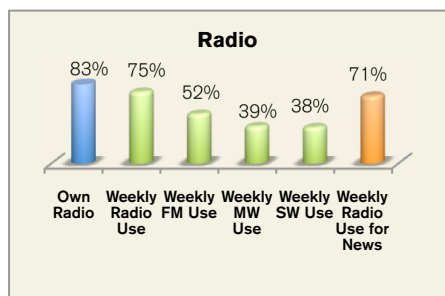
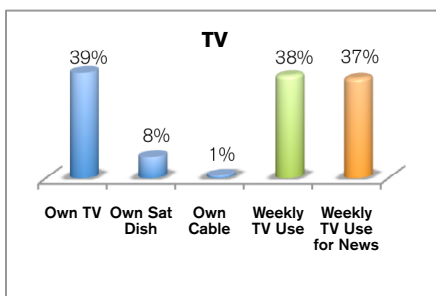
Total Population of Afghanistan: 28.4 million

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
Sex	%	%	%
Male	55	73	71
Female	45	27	29
Age			
15-24	32	30	28
25-34	25	28	28
35-44	22	23	23
45-54	11	12	13
55-64	6	5	5
65+	3	2	3

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
Education	%	%	%
Illiterate/No Formal	61	47	54
Elem./Inter.	19	21	20
Secondary	16	25	20
Coll./Univ.	3	6	3
Ethnicity/Nationality			
Pashtun	40	69	74
Tajik	31	21	15
Uzbek	11	4	4
Other	16	6	6

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
Residence	%	%	%
Urban	21	63	16
Rural	79	32	85
Language			
Dari	49	30	22
Pashto	37	66	74
Uzbek	11	4	3
Other	4	0	1

M E D I A U S E



Top Ten Media Outlets

1. Tolo TV
2. Ariana TV
3. Radio Afghanistan
4. TV Afghanistan
5. Radio Arman
6. Ariana Radio
7. Lemar TV
8. Shamshad TV
9. Afghan TV
10. VOA TV

Top Ten Sources of News

1. RFE/RL
2. BBC
3. Tolo TV
4. VOA
5. Radio Afghanistan
6. TV Afghanistan
7. Ariana TV
8. Radio Arman
9. Ariana TV
10. Lemar TV

New Media Index Rankings

Overall Rank	48/54
Wired Rank	49/54
Mobile Rank	43/54

Web Analytics

VOA Weekly Visitors	4,01
Weekly Visits	14,15
RFE/RL Weekly Visitors	7,42
Weekly Visits	24,69

C O N T E X T



Political Situation

- Freedom House Political Freedom Index: **NOT FREE** in 2010
- Economist Intelligence Unit Instability: **VERY HIGH RISK (7.8)** in 2009/2010
- One year before the planned beginning of withdrawal of US and NATO troops, the security situation has not improved in Afghanistan.
- Additionally, Karzai's government, on which the American administration had counted to help stabilize the security situation, has been ineffective and has garnered little trust among Afghans.
- In August 2010, eight foreign aid workers were killed in Badakhshan Province, and September saw an increase in violence leading up to September parliamentary elections, which were marred by claims of widespread fraud.

Media Environment

- Freedom House Press Freedom Index: **NOT FREE (165/196)** in 2010
- Reporters Without Borders Index: **54.25 (149/175)** in 2009
- National data above should be considered in conjunction with the fact that media use in Afghanistan differs rather radically among ethno-linguistic groups. Those who speak Dari at home, for example, are nearly twice as likely to use TV for news everyday than are Pashto speakers. Similarly, Pashto speakers are almost twice as likely to use radio for news on a daily basis – and listen far more frequently to international news.
- As a whole, Afghanistan is still very much a developing country when it comes to ICT infrastructure. The Internet is nascent, and mobile phones are used mostly for voice.
- 2009 was a difficult year for journalists in Afghanistan, who faced violence and threats from the Taliban, other militant groups and warlords, as well as the government around the time of the August 2009 elections.
- In March 2009, an Afghan journalist was fatally beaten in Kandahar. Two reporters working for foreign press were also killed in 2009.



PROFILE



Voice of America®



Language of Broadcast: Persian

Content: 49 hrs. of original and 119 hrs. of repeat TV programming per week; 35 hrs. of original radio programming per week; Internet

Distribution: TV: VOA is available via satellite. Though illegal many Iranians have dishes. Exactly how many is not known.

Radio: PNN broadcasts daily on MW, a BBG-owned facility in Kuwait and from a leased facility in Tajikistan. It also broadcasts daily on 3 IBB SW frequencies: BBG-owned facilities in Germany and Thailand and a leased BBG facility in Germany. In addition to TV and radio, PNN has several blogs, as well as Facebook and Twitter pages. It also posts extensively on YouTube.

Staff: 91

Budget: \$23,968,000

Established: 1942 to 1945; 1949 to 1960; 1964 to 1966 (radio feed service); 1979 to present; TV service established in 1996



RadioFreeEurope
RadioLiberty



Language of Broadcast: Persian

Content: RFE/RL's Radio Farda News and Info airs 55 hrs. of original and 13 hrs. of repeat radio programming per week; Radio Farda Music – 99 hrs. of original radio programming per week; Internet

Distribution: Delivery includes 24-hour cross-border MW from Abu-Dhabi, multiple SW frequencies covering the whole country, HotBird, ArabSat, AsiaSat, NileSat & TelStar12 in addition to Internet with proxies and streaming audio as well as 50,000+ Facebook friends.

Staff: 63

Budget: \$10,454,000

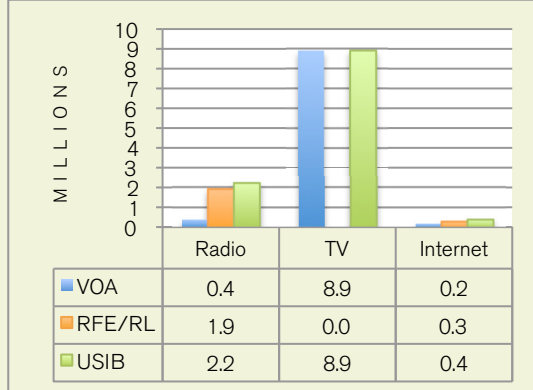
Established: 2002 to present



PERFORMANCE DATA

(Using Data from Iran, January-February 2010)

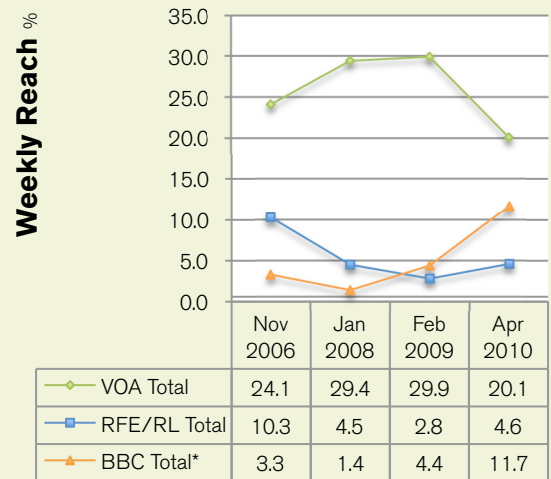
Audience Size



Weekly Reach by Media (%)

	VOA	RFE/RL	USIB
Radio	0.8	4.1	4.8
TV	19.6	na	19.6
Internet	0.4	0.6	0.9
Total	20.1	4.6	22.8

Weekly Reach



Awareness (%)

VOA	RFE/RL
45	56

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

	VOA	RFE/RL
Radio	78	86
TV	75	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

	VOA	RFE/RL
TV	81	na
Current Events	81	na
U.S. Culture (VOA) or Current Events in Iran (RFE/RL)	68	na
U.S. Policies	65	na

Quality

Combined Scores from audience panel

	VOA	RFE/RL
Radio	3.2	3.1
TV	3.3	na

*Reach figures for BBC Persian include TV beginning in February, 2009. The April 2010 survey was the first time BBC Persian TV reach was measured in exactly the same way as VOA Persian TV, by including program names as well as station name.

Weekly reach and audience demographic data are from a April, 2010 telephone survey of adults (15+) in Iran. All other data are from a January-February 2010 phone survey. Both surveys are representative of telephone households only (estimated at 90%).

Persian Broadcasting

Total Population of Iran: 73.2 million

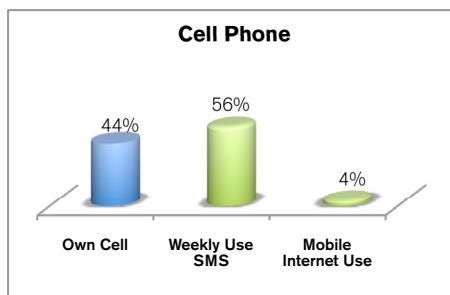
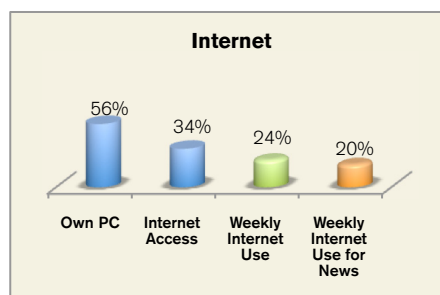
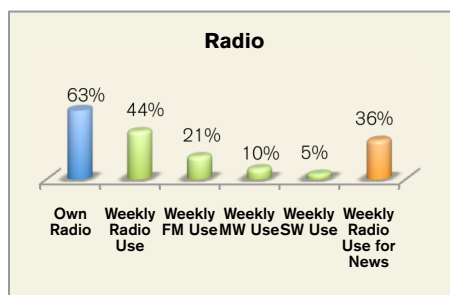
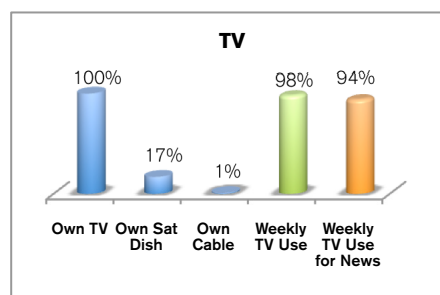
A U D I E N C E C O M P O S I T I O N

	Sample	VOA TV Weekly Aud.	RFE/RL Weekly Aud.
Sex	%	%	%
Male	51	54	63
Female	49	46	37
Age			
15-24	34	31	51
25-34	24	22	27
35-44	17	21	11
45-54	12	12	4
55-64	7	10	4
65+	5	4	2

	Sample	VOA TV Weekly Aud.	RFE/RL Weekly Aud.
Education	%	%	%
illiterate/No Formal	5	4	4
Elem./Inter.	23	23	15
Secondary	43	43	50
Coll./Univ.	29	30	31
Ethnicity/Nationality			
na			

	Sample	VOA TV Weekly Aud.	RFE/RL Weekly Aud.
Residence	%	%	%
Urban	66	62	75
Rural	35	38	25
Language			
na			

M E D I A U S E



Top Ten Media Outlets

1. IRIB Channel 1
2. IRIB Channel 2
3. Iran News Network
4. Jaam-e-Jaam
5. Google website
6. Yahoo! website
7. VOA-TV PNN
8. BBC Persian TV
9. Sahar TV
10. National Iranian TV

New Media Index Rankings

Overall Rank	22/54
Wired Rank	20/54
Mobile Rank	18/54

Web Analytics

VOA Weekly Visitors	88,217
Weekly Visits	351,931
RFE/RL Weekly Visitors	213,710*
Weekly Visits	974,397*

* Including Freigate

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: NOT FREE in 2010**
- **Economist Intelligence Unit Instability: VERY HIGH RISK (6.2) in 2009/2010**
- The June 2009 elections in which President Ahmadinejad was re-elected for a second term were highly contested and followed by protests in major Iranian cities, which were repressed by the Iranian authorities. Protests against Ahmadinejad's government continue to take place on a smaller scale.
- Iran has been in a long-running standoff with the international community regarding its nuclear program. Iranian authorities maintain that their nuclear enrichment program is peaceful, while the EU, the US, Israel and the UN Security Council suspect that Iran is building a nuclear weapon. In June, the Security Council approved a new round of sanctions against Iran, which expands the UN arms embargo and calls for measures against new Iranian banks abroad if they are suspected of being connected to the nuclear program.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (187/196) in 2010**
- **Reporters Without Borders Index: 104.14 (172/175) in 2009**
- Since the June 2009 post-election protests, Iranian authorities reinforced jamming of international television and radio signals. They also blocked websites and cell phone transmissions and cracked down on anti-regime journalists. Satellite dishes are officially banned, however, anecdotal evidence suggests that a good number of Iranians own dishes and have access to international TV channels.
- Younger Iranians are less intensive users of radio and much heavier users of Internet and SMS than their older compatriots. "Yesterday" Internet use among Iranians aged 15-24, for example, is nearly seven times greater than among Iranians over the age of 45 (21% versus 3%); similarly, 62% in this younger group used SMS "yesterday" while only 17% of those over 45 did so. While almost all Internet users access material in Persian, more than a third (36%) also report accessing information on the Internet in English.
- When asked about the various activities performed via the Internet, only a quarter of weekly Internet users said they had used the Internet "to follow the latest news." On the other hand, 41% reported using the Internet to "learn about a specific topic" in the past week, suggesting that use for general informational purposes is greater than for following breaking news.



Broadcasting
Board of
Governors

PROFILE



Voice of America®



Language of Broadcast: Portuguese to Africa

Content: 10.5 hrs. of original radio programming per week; Internet

Distribution: 6 affiliates (5 FM, 1 MW); 1 IBB FM, 1 IBB MW and 2-3 SW frequencies

Radio: VOA's affiliates in Mozambique reach the largest urban areas. Angola law forbids association with foreign broadcasts, but even its National Radio uses VOA reporting, which it takes from the service's website. The VOA transmitter in Sao Tome and Principe broadcasts the Portuguese airshow locally.

Web: The service is also available on the Internet and on such social networks as Facebook and Twitter. Diaspora radios also pick VOA Portuguese stories from the web.

Staff: 10

Budget: \$1,321,000

Established: 1976 to present



PERFORMANCE DATA *

Audience Size

MILLIONS

Luanda survey (February 2010) estimated 0.3 million weekly listeners [6.2% of a covered population of 4,327,796] and 0.1 million weekly website visitors [2.9%], and a national omnibus survey (May 2009) in Mozambique estimated 1.3 million weekly listeners and 0.1 million website visitors.

	Radio	Internet
VOA		

Weekly Reach by Media (%)**

VOA	
Radio	na
TV	na
Internet	na
Total	na

Weekly Reach %

Current national weekly reach data for Portuguese to Africa not available.

VOA

Awareness (%)

VOA
14.9

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

VOA	
Radio	na
TV	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

VOA	
Current Events	na
U.S. Culture	na
U.S. Policies	na

Quality

Combined Scores from audience panel

VOA	
Radio	3.2
TV	na

*Previous surveys indicated total media weekly reach rates for VOA Portuguese to Africa of 11.1% in Luanda, Angola (December 2006) and 25.1% in five cities of Mozambique (October 2005). Current sample of VOA weekly audience is too small for meaningful analysis.

Portuguese to Africa Broadcasting

A U D I E N C E C O M P O S I T I O N

Total Population of Angola 17.0 million and Mozambique 22 million

	Sample	VOA Weekly Audience
Sex	%	%
Male	na	na
Female	na	na
Age		
15-24	na	na
25-34	na	na
35-44	na	na
45-54	na	na
55-64	na	na
65+	na	na

	Sample	VOA Weekly Audience
Education	%	%
Primary or less	na	na
Junior School	na	na
High School	na	na
Vocational		
Coll./Univ.	na	na
Ethnicity/Nationality		
na	na	na

	Sample	VOA Weekly Audience
Residence	%	%
Urban	na	na
Rural	na	na
Language		
na	na	na

M E D I A U S E *

TV
Media use data is not available.

Radio
Media use data is not available.

Internet
Media use data is not available.

Cell Phone
Media use data is not available.

New Media Index Rankings

Overall Rank	na/54
Wired Rank	na/54
Mobile Rank	na/54

Web Analytics

Weekly Visitors	2,424
Weekly Visits	4,267

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: Angola—NOT FREE; Mozambique—PARTLY FREE**
- **Economist Intelligence Unit Instability: Angola—VERY HIGH RISK (7.6); Mozambique—MODERATE RISK (5.7) in 2009/2010**
- Angola continues to grapple with the repercussions of its decades-long civil war and weak political institutions. A new constitution enacted in early 2010 further concentrated power in the office of the president and replaced direct election of the president with a system in which the winning party in parliament appoints its leader to the presidency.
- Despite vast resource wealth, mainly in oil and diamonds, Angola faces massive poverty and limited infrastructure. Remnants of the conflict, including landmines, destroyed infrastructure, and armed civilians, make rebuilding all the more challenging.
- Mozambique held successful multi-party elections in October 2009 and President Armando Guebuza and the Frelimo Party continue to lead the country. Although winning in a landslide and enjoying a parliamentary majority, Guebuza, considered business and investment friendly, is under increasing pressure to alleviate the poverty that continues to afflict Mozambique.
- The particular legacy of Portuguese colonial administration in Africa means that both Angola and Mozambique populations speak Portuguese to a greater degree than many other Africans speak the colonial languages of their respective countries.

Media Environment

- **Freedom House Press Freedom Index: Angola—NOT FREE (139/196); Mozambique—PARTLY FREE (87/196) in 2010**
- **Reporters Without Borders Index: Angola—36.50 (119/175); Mozambique—19.00 (82/175) in 2009**
- The state-run media dominate on all platforms (radio, TV, and newspapers), with private media limited to smaller (often regional) audiences and subject to harassment and intimidation.
- Internet access is hard to come by outside of Luanda, and even TV and newspaper coverage is limited in rural areas.
- International broadcasters are prohibited by law from broadcasting via dedicated FM stations.
- Angola is one of the most challenging places in Africa to conduct research; there is very little local capacity, and few regional firms operate in Luanda. Research of any kind is extremely expensive, and coverage of rural areas usually prohibitively so.
- Mozambique enjoys a less restrictive media environment than Angola, and its cities are largely dominated by TV, with broad access to programming from Portugal and Brazil. The political opposition complains that state-run Antena Nacional does not offer it sufficient coverage, although the constitution guarantees media freedom.



PROFILE



Language of Broadcast: Romanian to Moldova

Content: 10.5 hrs. of original radio programming per week; Internet

Distribution: 4 affiliates (FM, MW & UKW)

RFE/RL's delivery includes 3 national FM affiliates and 6 regional affiliates including 2 FM stations covering Transdnistrian region, HotBird and Internet with streaming audio (Romanian site with Russian page).

Staff: 4

Budget: \$1,125,000

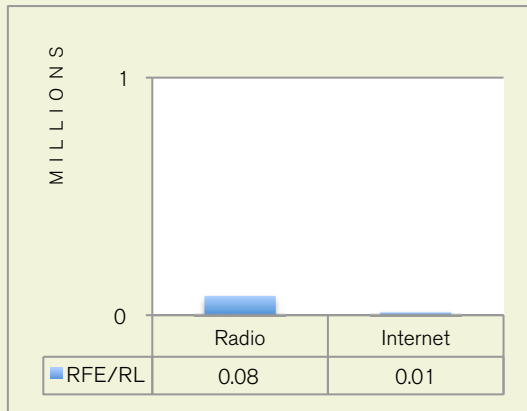
Established: 1950 to present



PERFORMANCE DATA

(Using Data from Moldova, October 2009)

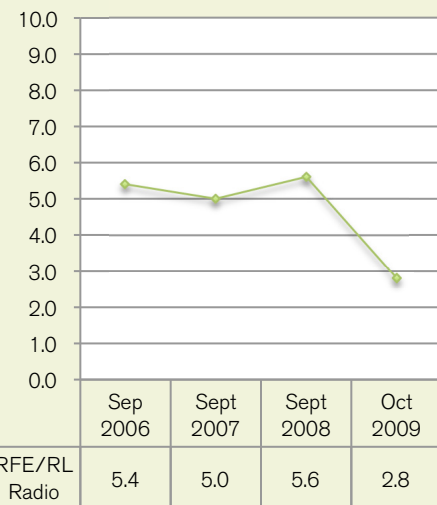
Audience Size



Weekly Reach by Media (%)

RFE/RL	
Radio	2.8
TV	na
Internet	0.4
Total	3.1

Weekly Reach %



Awareness (%)

RFE/RL	
	45

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

RFE/RL	
Radio	91
TV	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

RFE/RL	
Current Events	95
Current Events in Moldova	95
U.S. Policies	na

Quality

Combined Scores from audience panel

RFE/RL	
Radio	3.5
TV	na

Data are from an October 2009 nationwide survey of adults (15+) in Moldova. 2010 Omnibus data indicates a weekly reach of 4.7 percent radio and Internet reach of 1.4 percent.

Romanian to Moldova Broadcasting

A U D I E N C E C O M P O S I T I O N

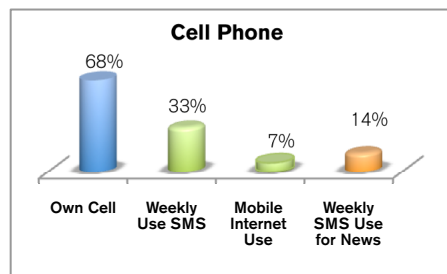
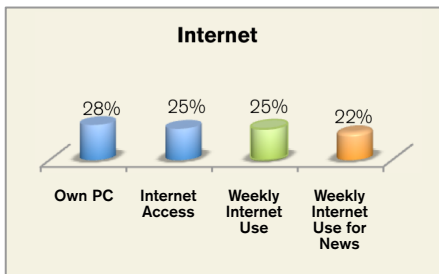
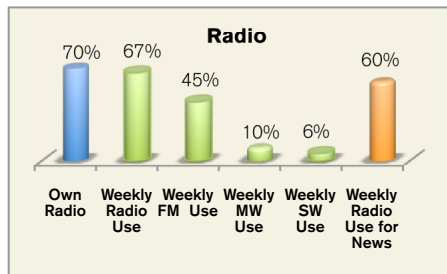
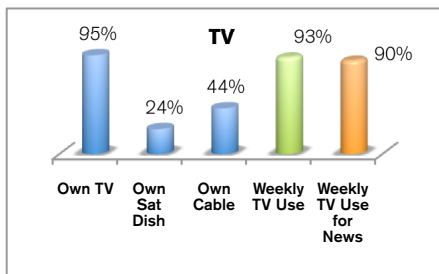
Total Population of Moldova: 4.1 million

	Sample	RFE/RL Weekly Audience
Sex	%	%
Male	47	61
Female	53	39
Age		
15-24	23	15
25-34	18	24
35-44	17	20
45-54	17	26
55-64	14	10
65+	12	5

	Sample	RFE/RL Weekly Audience
Education	%	%
None	2	0
Primary	20	9
Secondary	44	37
Coll./Univ.	31	45
Ethnicity/Nationality		
Moldovan	81	86
Russian	6	4
Ukrainian	5	2
Gagauz	4	0
Other	4	9

	Sample	RFE/RL Weekly Audience
Residence	%	%
Urban	42	47
Rural	58	54
Language		
Moldovan/Romanian	79	88
Russian	16	12
Other	5	0

M E D I A U S E



Top Ten Media Outlets

1. Prime TV (ORT)
2. Moldova 1
3. Pro TV
4. NIT
5. RTR
6. Radio Moldova
7. Romania 1
8. NTV
9. Radio Naroc
10. Russkoe Radio

Top Ten Sources of News

1. Prime TV (ORT)
2. Moldova 1
3. Pro TV
4. Radio Moldova
5. NIT
6. Romania 1
7. www.google.com
8. RTR
9. Radio Noroc
10. Russkoe Radio

New Media Index Rankings

Overall Rank	17/54
Wired Rank	12/54
Mobile Rank	28/54

Web Analytics

Weekly Visitors	5,170
Weekly Visits	10,287

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: PARTLY FREE in 2010**
- **Economist Intelligence Unit Instability: VERY HIGH RISK (7.5) in 2009/2010**
- The Communist Party, which had ruled Moldova since 2001, was swept from power following a re-run of the disputed elections of April 2009. A pro-Western alliance headed by Prime Minister Vlad Filat took office in September 2009. Among the priorities of the new government is Moldova's integration with Europe, although not as a full member of the European Union, but as a special partner.
- However, the governing coalition may not be able to consistently implement its policies as it does not have decisive majority in parliament. The coalition has been unable to break the political deadlock that arose after communist president Vladimir Voronin resigned in September and parliament twice failed to elect a new president.
- A referendum held in September 2010 on whether to elect the country's president by popular vote failed to deliver a mandate due to low voter turnout—less than the required 33%.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (144/196) in 2010**
- **Reporters Without Borders Index: 33.75 (114/175) in 2009**
- Television is the most popular medium in Moldova. Apart from terrestrial television, Moldova now has about 168 cable operators. Penetration in rural areas is growing but still quite low, and in many places the state broadcaster Teleradio Moldova 1 is the only available option. Local analysts argue that the state broadcaster is heavily influenced by the government.
- The media divide along government/opposition lines; there are few genuinely independent outlets that strive to verify stories and approach multiple sources. This tendency towards partisan reporting was particularly pronounced in the wake of last year's disputed elections and the subsequent political crisis in Moldova.
- Few television broadcasters generate their own news content; smaller regional and local stations have limited capacity to produce news. Independent research done in Moldova shows that foreign entertainment programs relayed by Moldovan stations draw much higher audiences than do news broadcasts.
- Internet use is growing; a quarter of Moldovans went online at least once a week in 2009. Broadband penetration, however, remains low, at 4 percent. The use of social networking sites is growing as well and social media and text messaging were widely credited for the anti-communist youth protests in 2009.



PROFILE



Language of Broadcast: Russian

Content: 1.25 hrs. of original video and features per week; Internet

Distribution: VOA Russian now provides its content exclusively through its Internet site (www.golosameriki.us). Through text, audio and video, this website provides news, correspondent reports, interviews, analysis, news-related blogs, and social networking features. Russian Service content is consistently republished or cited by Russian websites, and YouTube videos are viewed hundreds of thousands of times every month.

Staff: 19

Budget: \$3,105,000

Established: 1947 to present; TV service established in 2005



RadioFreeEurope
RadioLiberty



Language of Broadcast: Russian

Content: 88 hrs. of original and 80 hrs. of repeat radio programming per week; Internet

Distribution: 7 affiliates (6 FM, 1 MW), 2 to 4 SW frequencies, Satellite

RFE/RL's delivery includes affiliates in Chelyabinsk (UkV), Apatity (FM), Zverevo (tochka) & Gukovo (tochka), plus our 24-hour MW in Moscow, full audio streams available free of charge on municipal Intranets in Tomsk and Novosibirsk, multiple SW frequencies, HotBird, AsiaSat in addition to Internet with streaming audio.

Staff: 38 (32 on board)

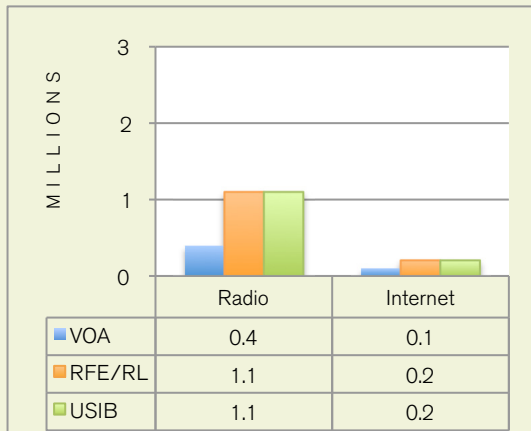
Budget: \$11,461,000

Established: 1953 to present



PERFORMANCE DATA (Using Data from Russia, December 2009)

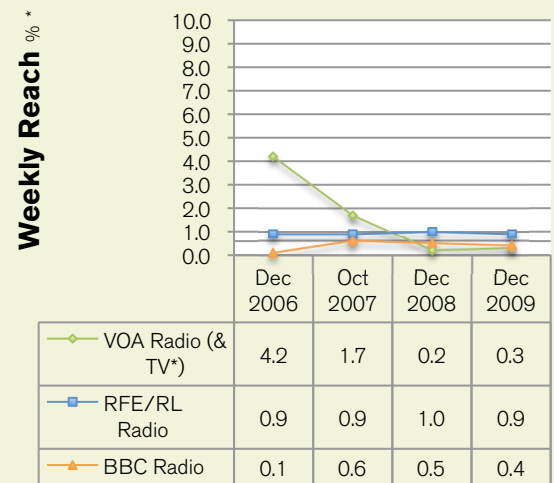
Audience Size



Weekly Reach by Media (%)

	VOA	RFE/RL	USIB
Radio	0.3	0.9	0.9
Internet	0.1	0.2	0.2
Total	0.3	1.0	1.0

Weekly Reach %



Awareness (%)

VOA	RFE/RL
53	47

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)**

	VOA	RFE/RL
Radio	na	na
TV	na	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)**

	VOA	RFE/RL
Current Events	na	na
U.S. Culture (VOA) or Current Events in Russia (RFE/RL)	na	na
U.S. Policies	na	na

Quality

Combined Scores from audience panel

	VOA	RFE/RL
Radio	na	3.2
TV	na	na

*Weekly reach for VOA included TV until December, 2008. December 2009 VOA radio reach may reflect unofficial rebroadcast of podcast.

**Samples of VOA and RFE/RL weekly listeners in the survey are too small for meaningful analysis.

Data are from a December 2009 nationwide survey of adults (15+) in Russia.

Russian Broadcasting

Total Population of Target Country: 141.8 million

A U D I E N C E C O M P O S I T I O N

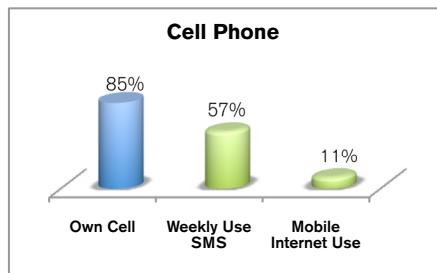
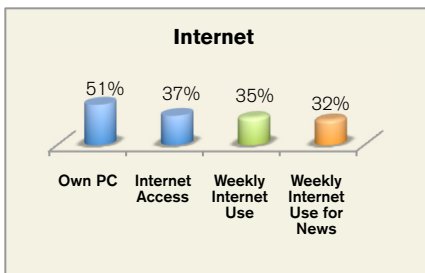
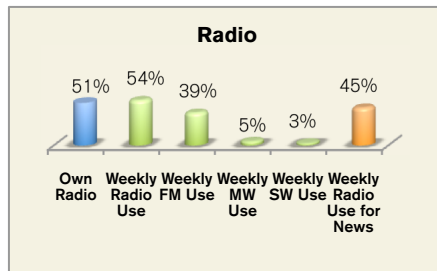
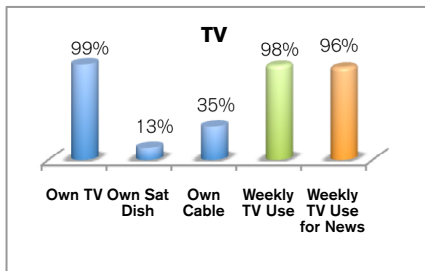
	Sam.	VOA Weekly Aud.**	RFE/RL Weekly Aud.**
Sex	%	%	%
Male	46	na	na
Female	54	na	na
Age			
15-24	18	na	na
25-34	19	na	na
35-44	15	na	na
45-54	17	na	na
55-64	14	na	na
65+	15	na	na

	Sam.	VOA Weekly Aud.**	RFE/RL Weekly Aud.**
Education	%	%	%
None	0	na	na
Primary	10	na	na
Secondary	63	na	na
Coll./Univ.	25	na	na
Ethnicity/Nationality			
Russian	88	na	na
Other	12	na	na

	Sam.	VOA Weekly Aud.**	RFE/RL Weekly Aud.**
Residence	%	%	%
Urban	75	na	na
Rural	25	na	na
Language			
Russian	96	na	na
Other	4	na	na

**Samples of VOA and RFE/RL weekly listeners in the survey are too small for meaningful analysis.

M E D I A U S E



Top Three Media Outlets

1. ORT-1
2. RTR
3. Ren-TV

New Media Index Rankings

Overall Rank	9/54
Wired Rank	12/54
Mobile Rank	13/54

Web Analytics

VOA Weekly Visitors	98,598
Weekly Visits	150,522
RFE/RL Weekly Visitors	297,506
Weekly Visits	576,398

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: NOT FREE in 2010**
- **Economist Intelligence Unit Instability: HIGH RISK (6.5) in 2009/2010**
- As the Putin-Medvedev tandem strengthens, freedoms in Russia continue to degrade. The government maintains tight control over the interpretation of historical and contemporary economic information; the freedom of religion and elections are widely abused. Despite the recent reform, police corruption is on the increase; the police are frequently used as an instrument of terror against political activists and independent media outlets. Self-censorship is widespread among journalists.
- Government influence over media outlets remains significant; the government, state-affiliate agencies, or the government's business allies own the majority of media outlets. Strategic distribution of federal subsidies and close control over advertising budgets create an economic environment hostile to independent media outlets. Thus, most of Russian media audience is exposed to pro-government propaganda and/or entertainment.
- Internet freedom has degraded in recent years as the Federal Security Bureau (FSB) has obtained legal permission to monitor the population's online activities as part of "anti-extremism" prevention measures. The same anti-extremism decree is used to shut down oppositional websites and prosecute oppositional bloggers. FSB is actively monitoring all mobile communications as well.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (175/196) in 2010**
- **Reporters Without Borders Index: 60.88 (153/175) in 2009**
- TV remains the leading source of state propaganda and the main focus of state censorship. Radio is still popular as a source of information with 45 percent listening weekly; however, as the interest in radio declines so does the state's pressure.
- A media environment dominated by the state and characterized by disillusioned audience creates a difficult media market for the US international broadcasters. Both VOA and RFE/RL have only limited programming on FM; the forced switch to shortwave limits the potential audience of the broadcasters.
- The use of the Internet is increasing at a fast pace and is becoming a highly regarded source of news and information. It is fragmented and highly competitive in nature. Commercial panel-based ratings data (Comscore Jun-Aug 2010) estimates audience for 475 new-information online properties, less than 10 percent of which reach one percent of monthly Internet users.
- Despite the FSB's monitoring practices, the internet remains the only relatively free media platform. It is, therefore, not surprising that the US International Broadcasters focus on developing their internet platforms, as those still provide some opportunities to fulfill USIBs' mission in Russia.



PROFILE



RadioFreeEurope
RadioLiberty



Language of Broadcast: Avar, Chechen, Circassian

Content: 7 hrs. of original and 7 hrs. of repeat radio programming per week; Internet

Distribution: 2 IBB SW frequencies

Staff: 10

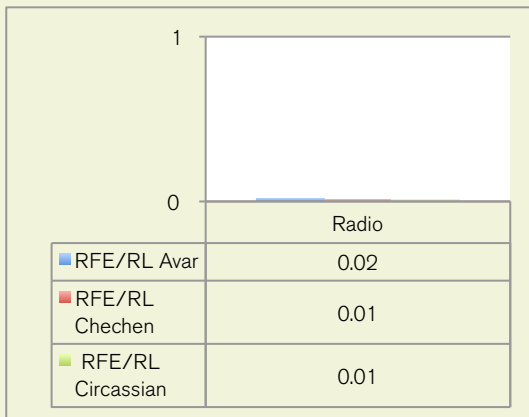
Budget: \$1,271,000

Established: Avar: 1951 to 1970*s; 2002 to present; Chechen: 1953 to 1970; 2002 to present; Circassian: 2002 to present



PERFORMANCE DATA *

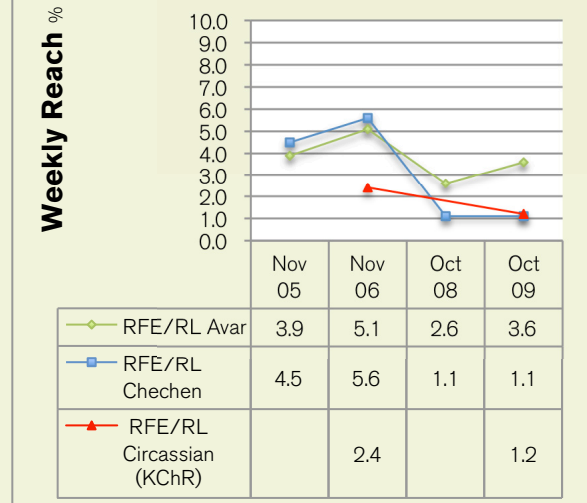
Audience Size



Weekly Reach by Media (%)

	RFE/RL Avar	RFE/RL Chechen	RFE/RL Circassian
Radio	3.6	1.1	1.2
TV	na	na	na
Internet	na	na	na
Total	3.6	1.1	1.2

Weekly Reach %



Awareness (%)

RFE/RL Avar	RFE/RL Chechen	RFE/RL Circassian
18	39	15

Credibility

Percentage of surveyed weekly audience that found broadcasts credible (%)**

	RFE/RL Avar	RFE/RL Chechen	RFE/RL Circassian
Radio	na	na	na
TV	na	na	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)**

	RFE/RL Avar	RFE/RL Chechen	RFE/RL Circassian
Current Events	na	na	na
Current Events in Russia	na	na	na
U.S. Policies	na	na	na

Quality

Combined Scores from audience panel

	RFE/RL Avar	RFE/RL Chechen	RFE/RL Circassian
Radio	2.8*	2.8*	2.8*
TV	na	na	na

*Number reflects quality score for all three languages in the Russian North Caucasus service.

Data are from October 2009 surveys of adults (15+) in Chechnya, Dagestan and Kabardino-Balkaria/Karachaevo-Cherkessia. The surveys are representative of Chechen-speakers, Avar-speakers and Circassian-speakers in the respective republics.

*The Russia North Caucasus Languages service (NCLS) targets the republics of Chechnya (population: 0.3m), Dagestan (1.8m), Karachaevo-Cherkessia (0.3m), Kabardino-Balkaria (0.7m) and Adygea (0.4m). Audience rates presented here are for Avar in Dagestan, Chechen in Chechnya and Circassian in Karachaevo-Cherkessia/Kabardino-Balkaria. An October 2008 survey indicated a 0.4% total media weekly reach rate for RFE/RL NCLS in Adygea.

*Samples of weekly Avar, Chechen and Circassian weekly listeners are too small for meaningful analysis.

Russia North Caucasus Broadcasting

A U D I E N C E C O M P O S I T I O N

Total Population of Target Country: See note*

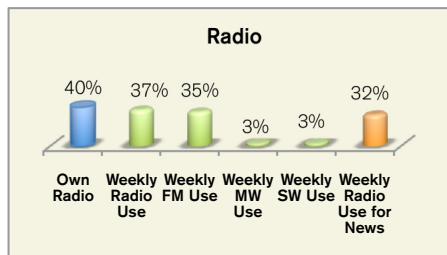
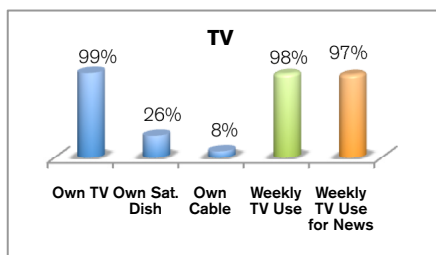
	Comb. Sam.	Avar Wk. Rch.	Chech. Wk. Rch.	Circ. Wk. Rch.
Sex	%	%	%	%
Male	47	na	na	na
Female	53	na	na	na
Age				
15-24	27	na	na	na
25-34	23	na	na	na
35-44	17	na	na	na
45-54	18	na	na	na
55-64	9	na	na	na
65+	5	na	na	na

	Comb. Sam.	Avar Wk. Rch.	Chech. Wk. Rch.	Circ. Wk. Rch.
Education	%	%	%	%
None/Primary	6	na	na	na
Secondary	36	na	na	na
Technical	23	na	na	na
Higher	34	na	na	na
Ethnicity/Nationality				
Avar	35	na	na	na
Chechen	47	na	na	na
Kabardin	13	na	na	na
Adyg	5	na	na	na

	Comb. Sam.	Avar Wk. Rch.	Chech. Wk. Rch.	Circ. Wk. Rch.
Residence	%	%	%	%
Urban	39	na	na	na
Rural	61	na	na	na
Language Spoken At Home				
Avar	31	na	na	na
Chechen	46	na	na	na
Circassian	16	na	na	na
Russian	8	na	na	na

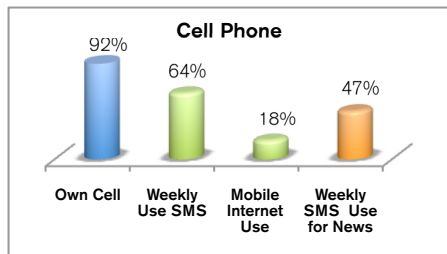
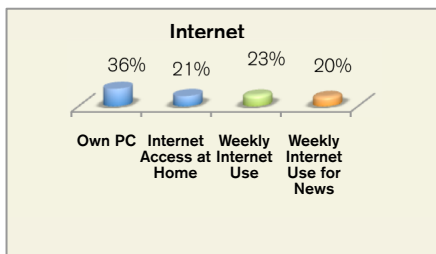
M E D I A U S E

(Using combined sample from Chechnya, Dagestan and Kabardino-Balkaria/Karachaevo-Cherkessia, Oct '09)



Chechnya Top Ten Media Outlets

1. ORT-1
2. RTR-Rossiia
3. NTV
4. GTRK "Grozny"
5. ChGTRK "Vainakh"
6. REN-TV
7. Put
8. Kultura
9. Radio Grozny (GTRK)
10. Molodezhnoe Radio



New Media Index Rankings

Overall Rank	na/54
Wired Rank	na/54
Mobile Rank	na/54

Web Analytics

Weekly Visitors	na
Weekly Visits	na

C O N T E X T



Stability



Political Freedom



Press Freedom



Ease of Distribution



Competition

Political Situation

- **Freedom House Political Freedom Index: Russia—NOT FREE in 2009**
- **Economist Intelligence Unit Instability: Russia—HIGH RISK (6.5) in 2009/2010**
- Currently, the North Caucasus is Russia's most difficult region in terms of political stability, human rights, and civil freedoms. Although the political context differs for each of the republics, the entire region is characterized by the ongoing fighting: between Russian state troops and the insurgents, as well as among different insurgent leaders and groups.
- The fighting is accompanied by mass murders masked as counter-terrorism activities; hundreds of people, especially younger males, have disappeared since the second Caucasus war. Widespread corruption and arbitrary appointments of officials by Kadyrov and other NC leaders introduce the extreme level of lawlessness.
- In the past year, the political instability in Ingushetia has resulted in a record number of armed attacks against state representatives. The relative stability in Chechnya is grounded in public fear induced by the brutality of Kadyrov's surrounding and informational starvation of the residents. Dagestan's political instability is aggravated by the armed conflicts among multiple ethnic groups residing in the republic. In all three republics, the clashes between "traditional" and Salafi Muslims exacerbate the overall violent environment.

Media Environment

- **Freedom House Press Freedom Index: Russia—NOT FREE (175/196) in 2010 (Russia)**
- **Reporters Without Borders Index: 60.88 (153/175) in 2009**
- The North Caucasus is one of the most dangerous regions of the world for independent journalists and other civil society activists. In the past years, many have been murdered and many more are harassed on a daily basis.
- In all North Caucasus republics, interest in news declined in 2009, partially due to restrictions in information flow. TV dominates the market; approximately eight-in-ten use it daily for news and information in each republic. In the entire region, Russia-originated channels – ORT, RTR Planeta, and NTV – enjoy the highest weekly reach; however, the majority trust smaller local stations and remain suspicious of Russia-originated programming.
- New media reach in the region is rapidly growing and has long surpassed the reach of radio; depending on the republic 18 to 27 percent goes online weekly. The rise in the use of the Internet is largely driven by new functionalities and near-universal ownership of mobile phones, which are by far the most common method of accessing the Internet.



Broadcasting
Board of
Governors

PROFILE



Language of Broadcast: Serbian

Content: 3.75 hrs. of original TV programming per week; 3.5 hrs. of repeat radio programming per week; Internet

Frequencies: 30 TV affiliates in Serbia, 7 in Montenegro, 7 in Kosovo, 7 in Republic Srpska (Bosnia-Herzegovina), 1 in Macedonia; 20 radio affiliates in Serbia and Kosovo

Distribution: TV: The Service broadcasts 30-minute TV shows *Open Studio* (Mon-Fri) and *Weekend Studio* (Sat-Sun). The shows are rebroadcast by about 50 TV affiliates in Serbia, Montenegro, Kosovo, Republic Srpska (Bosnia-Herzegovina), and Macedonia. There is also a weekly interactive program with public service TV Montenegro and two weekly TV interactive programs with major Serbian independent TV station B92.

Podcast: 1.25 hours of audio podcast programming per week. Around 20 radio stations in Serbia and Kosovo simulcast the TV shows or use audio podcast.

Web: The Serbian service maintains an up-to-date website, provides updates on Twitter and Facebook, keeps a blog on the popular B92 website, and provides video on YouTube

Staff: 9

Budget: \$1,277,000

Established: 1943 to present; TV service established in 1996



RadioFreeEurope
RadioLiberty



Language of Broadcast:

Serbian, Montenegrin, Bosnian, Croatian

Content: 10.5 hrs. of original and 7 hrs. of repeat radio programming per week; Internet

Distribution: RFE/RL's delivery includes 35 FM stations in addition to HotBird and Internet with streaming audio.

Staff: 17†

Budget: \$4,410,000†

Established: 1994 to present

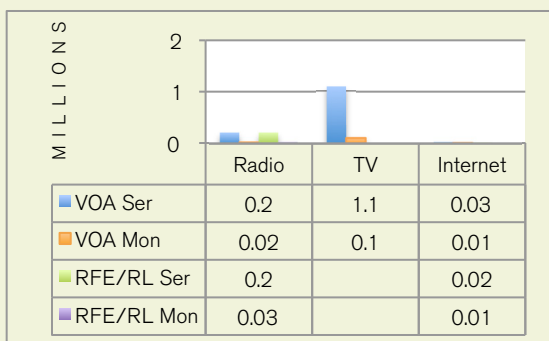
† Numbers reflect RFE/RL South Slavic service totals which include Albanian, Bosnian, Macedonian, Montenegrin and Serbian.

Please see separate Montenegrin page for further information on that market.



PERFORMANCE DATA (Using Data from Serbia and Montenegro, July 2009)

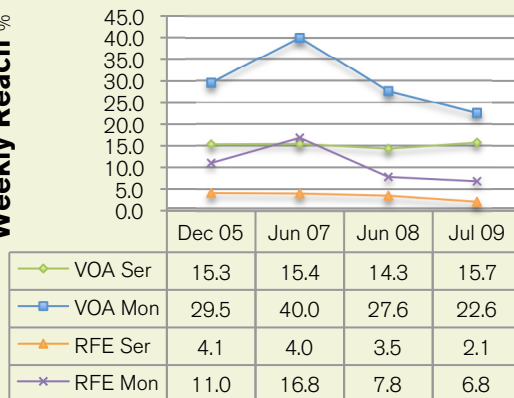
Audience Size



Weekly Reach by Media (%)

	VOA Serbia	VOA Montenegro	RFE/RL Serbia	RFE/RL Montenegro
Radio	3.1	4.3	2.0	6.3
TV	14.1	21.6	na	na
Internet	0.4	0.9	0.2	0.7
Total	15.7	22.6	2.1	6.8

Weekly Reach %



Awareness (%)

VOA Serbia	VOA Montenegro	RFE/RL Serbia	RFE/RL Montenegro
71	71	72	73

Credibility

Percentage of surveyed weekly audience that found broadcasts credible (%)

	VOA		RFE/RL	
	Ser	Mon	Ser	Mon
Radio	88	73	91	93
TV	89	94	na	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

	VOA Radio*		RFE/RL	
	Ser	Mon	Ser	Mon
Cur. Events	15	14	13	18
U.S. Culture (VOA)/ Current Events in Ser/Mon (RFE/RL)	21	29	21	21
U.S. Pol.	20	28	21	23

Quality

Combined Scores from audience panel

	VOA Serbia	RFE/RL Serbia
Radio	3.7	3.3
TV	3.3	na

*Bosnia/Kosovo footnote

**Understanding ratings for VOA TV in Serbia are: 23% for Current Events, 31% for U.S. Culture, 34% for U.S. Policies. Understanding ratings for VOA TV in Montenegro are: 15% for Current Events, 17% for U.S. Culture, 16% for U.S. Policies.

Data are from July 2009 nationwide surveys of adults (15+) in Serbia and Montenegro.

Serbian/Montenegrin Broadcasting

A U D I E N C E C O M P O S I T I O N

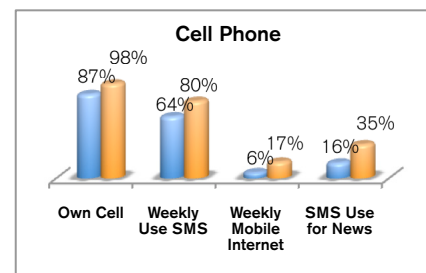
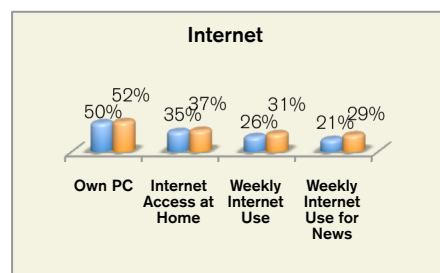
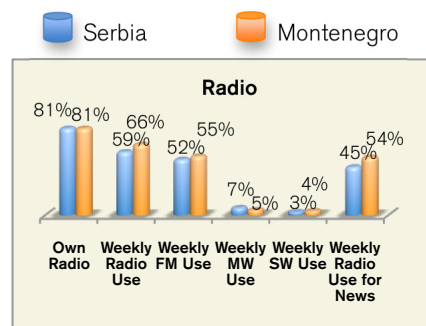
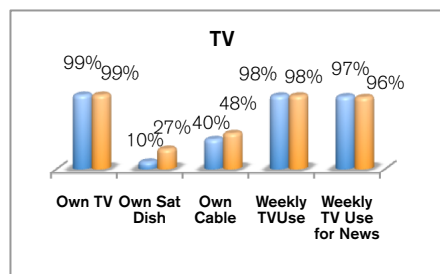
Total Population of: Serbia 7.3 M and Montenegro 0.6 M

	Serbia Sam.	VOA Serbian Wkly. Aud.	RFE/RL Serbian Wkly. Aud.
Sex	%	%	%
Male	48	56	48
Female	52	44	52
Age			
15-24	14	7	7
25-34	18	16	9
35-44	14	15	9
45-54	17	21	23
55-64	19	26	32
65+	18	15	21

	Serbia Sam.	VOA Serbian Wkly. Aud.	RFE/RL Serbian Wkly. Aud.
Education	%	%	%
Elementary	35	27	19
Secondary	48	50	58
Higher	17	23	23
Ethnicity/Nationality			
Serbian	86	83	59
Montenegrin	1	1	12
Other	13	16	39

	Serbia Sam.	VOA Serbian Wkly. Aud.	RFE/RL Serbian Wkly. Aud.
Residence	%	%	%
Urban	56	63	77
Rural	44	37	23
Language Spoken At Home			
Ser/Mon/Cro/Bos	92	93	89
Other	8	7	11

M E D I A U S E



Serbia Top Ten Sources of News

1. RTS 1,2
2. B92 TV
3. Pink
4. Blic
5. Fox
6. Vecernje novosti
7. www.google.com
8. Avala
9. Kurir
10. Politika Radio

Monte. Top Ten Sources of News

1. TV Crna Gore
2. TV In
3. Vijesti
4. Dan
5. Atlas TV
6. TV Elmag
7. Pobjeda
8. Radio Elmag
9. Vecernje novosti
10. Radio Podgorica

New Media Index Rankings (Serbia)

Overall Rank	7/54
Wired Rank	8/54
Mobile Rank	7/54

Web Analytics

VOA Weekly Visitors	5,963
Weekly Visits	11,374
RFE/RL Weekly Visitors	19,058
Weekly Visits	46,013

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: Serbia—FREE; Montenegro—FREE in 2009**
- **Economist Intelligence Unit Instability: Serbia—HIGH RISK (6.4); Montenegro—HIGH RISK (6.4)**
- The current pro-western government in Belgrade has made EU membership a priority. Indeed, the country formally applied for EU membership at the end of 2009. Shortly before that, Serbs had regained the right to visa-free travel to most EU countries.¹
- Kosovo remains a thorny issue in Serbia. The country is currently awaiting a decision by the International Court of Justice on the legality of Kosovo's independence and is ready to appeal to the United Nations to sanction new talks on Kosovo's status.
- The Serbian public, in the meantime, is more concerned about the deepening economic crisis, high unemployment and the government's inability to tackle pressing problems such as entrenched corruption and a dysfunctional judicial system.
- Montenegro has experienced strong economic growth since 2006 and attracted significant foreign investment, especially in tourism and infrastructure.
- However, as in all the former Yugoslav republics, corruption and organized crime remain a serious problem in Montenegro and the institutions responsible for fighting organized crime weak.
- In 2009 the Montenegrin government was accused of involvement in tobacco smuggling. Prime Minister Milo Djukanovic was indicted by an Italian court, but used his immunity to avoid prosecution.

Media Environment

- **Freedom House Press Freedom Index: Serbia—PARTLY FREE (78/196); Montenegro—PARTLY FREE (80/196) in 2010**
- **Reporters Without Borders Index: Serbia—15.50 (62/175); Montenegro—17.00 (77/175)**
- Serbia is home to the largest number of media outlets in the Western Balkans. Commercial radio stations alone numbered 530 in 2009. Despite recent attempts to regulate the market, illegal media are still tolerated.
- Privatization of state-funded local media has been stalled, keeping local outlets under constant pressure from local governments and politicians. As a result, news programs continue to exhibit strong political biases.
- In 2009, the government passed legislation tightening its control over the media. In particular, the introduction of steep fines for media outlets accused of defamation is expected to lead to even stronger self-censorship and to further stifle investigative reporting.
- The media market in Montenegro is overcrowded, with dozens of radio and TV stations catering to a population of less than 700,000. Most private media are unsustainable and struggling to survive; state-owned media enjoy government subsidies.
- The government continues to interfere in the work of media regulatory bodies such as the Agency for Telecommunications. The allocation of national broadcasting licenses in 2009 was particularly controversial with local experts arguing that the process favored pro-government broadcasters.
- The tendency towards self-censorship is aggravated by Montenegro's legislation treating libel as a criminal offence. The threat of excessive fines or imprisonment discourages journalists from criticizing politicians and government officials.



PROFILE



Language of Broadcast: Somali

Content: 18 hrs. of original and 7 hrs. of repeat radio programming per week; Internet

Distribution: 7 affiliates (7 FM), IBB: 1 MW, 2 FM and 2-3 IBB SW frequencies

The Somali Service is distributed: on shortwave; on VOA FMs in Hargeisa and Djibouti, which broadcast all Somali Service shows, originals and repeats, and on 5 private FM affiliates; via Arabsat, the leading satellite services provider in the Arab world; and on the Somali Service Website, which streams the Service broadcasts live and is particularly popular with the Somali diaspora community.

Staff: 6

Budget: \$2,033,000

Established: 1992 to 1994; 2007 to present



PERFORMANCE DATA

(Using Data from Mogadishu, March 2010)

Audience Size*

MILLIONS

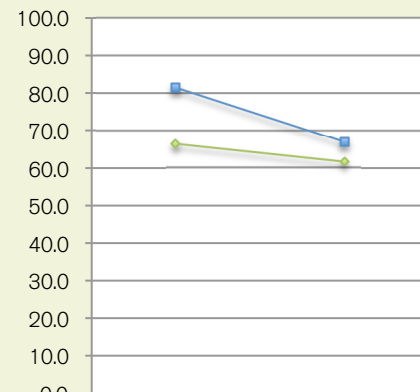
*Due to the lack of reliable population data for Mogadishu it is not possible to project an audience estimate for the VOA Somali service, even in that city. Percentage reach is based on unweighted sample data

	Radio	Internet
VOA		

Weekly Reach by Media (%)

VOA	
Radio	61.7
TV	na
Internet	10.6
Total	63.6

Weekly Reach %



Awareness (%)

VOA	
	89

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

VOA	
Radio	89
TV	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

VOA	
Current Events	94
U.S. Culture	58
U.S. Policies	44

Quality

Combined Scores from audience panel

VOA	
Radio	3.3
TV	na

Data are from a March 2010 survey of adults (18+) in Mogadishu only.

Somali Broadcasting

Total Population of Somalia: 9.4 million

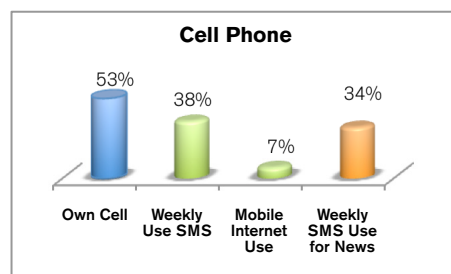
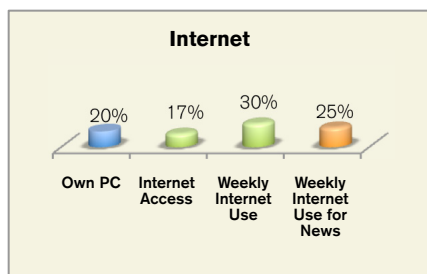
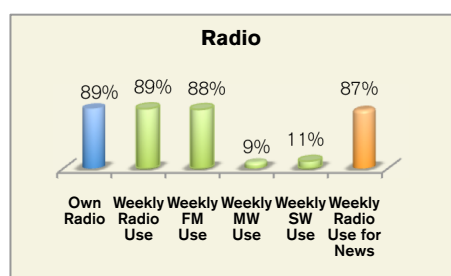
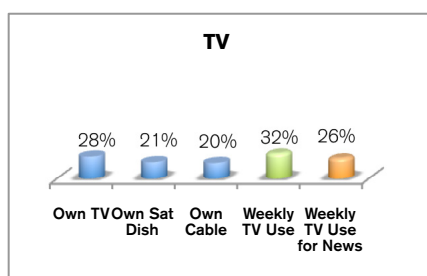
A U D I E N C E C O M P O S I T I O N

	Sample	VOA Weekly Audience
Sex	%	%
Male	64	65
Female	36	35
Age		
15-24	27	27
25-34	37	47
35-44	16	18
45-54	5	6
55-64	2	2
65+	<1	<1

	Sample	VOA Weekly Audience
Education	%	%
None	27	29
Primary	23	22
Secondary	25	29
Higher	12	14
Ethnicity/Nationality		
Somali	98	99
Other	2	1

	Sample	VOA Weekly Audience
Residence	%	%
Urban	100	100
Rural	na	na
Language		
Somali	98	99
Arabic	2	1

M E D I A U S E



Top Ten Media Outlets

1. Horn Afrik
2. Capital Voice
3. BBC Somali
4. VOA Somali
5. Radio Shabelle
6. Radio Mogadishu
7. Simba
8. IQK
9. GBC
10. Furqan

Top Ten Sources of News

1. Horn Afrik
2. Shabelle
3. Universal TV
4. Al Jazeera
5. Capital Voice
6. Shabelle TV
7. VOA
8. CNN
9. IQK
10. BBC

New Media Index Rankings

Overall Rank na/54
Wired Rank na/54
Mobile Rank na/54

Web Analytics

Weekly Visitors 23,207
Weekly Visits 91,179

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: NOT FREE in 2010**
- **Economist Intelligence Unit Instability: NA in 2009/2010**
- The embattled Transitional Federal Government continues to struggle to establish legitimacy nearly six years after coming into existence. Elections tentatively planned for 2011 hold little promise of change, as the government faces challenges on many fronts, most visibly (and violently) from the two main Islamist insurgent groups, Al-Shabaab and Hizbul Islam.
- With little rule of law, piracy and terrorism have flourished throughout the country.
- Two regions, Somaliland and Puntland, have declared autonomous rule and essentially operate as independent states.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (181/196) in 2010**
- **Reporters Without Borders Index: 77.50 (164/175) in 2009**
- Not surprisingly, Somalia's media environment has been devastated by the country's political and economic vacuum. There are few formally trained journalists, little and low-quality equipment, and insufficient financial resources. The few private radio and TV stations are often closely linked to political factions and subject to political pressure.
- Journalists face incredible risks, with at least 19 journalists having lost their lives and countless others facing harassment and detainment by the various political factions.
- The administrations of Somaliland and Puntland have imposed very tight media controls and censorship. The Islamist insurgent groups have also begun challenging the media: Hizbul Islam threatened violence against broadcasters who played music on air, and Al-Shabaab imposed a ban of its own, threatening reprisal against any station airing BBC or VOA programming.
- In the absence of rule of law or critical infrastructure, research of any kind is extremely challenging. There are no reliable estimates of population distribution on which to base national survey samples, and many areas are inaccessible. Even within Mogadishu, active fighting prevents researchers from moving freely. Local interviewers trained and coordinated through research centers in Nairobi, Kenya are able to collect reasonably representative data and conduct in-depth interviews and other qualitative studies, but research of any kind is risky and expensive.



PROFILE



Language of Broadcast: Spanish

Content: 162 hrs. of radio programming per week; 168 hrs. of TV programming per week; Internet

Distribution: IBB: AeroMarti, DirectTV, 1 MW, and 2-3 IBB SW frequencies

Staff: 136

Budget: \$30,168,000 †

Established: Radio Marti – 1985 to present; TV Marti – 1990 to present

† includes additional indirect costs



Voice of America



Language of Broadcast: Spanish

Content: See Spanish to Latin America

Distribution: SW only

Staff: See Spanish to Latin America

Budget: See Spanish to Latin America

Established: See Spanish to Latin America



PERFORMANCE DATA *

Audience Size

MILLIONS

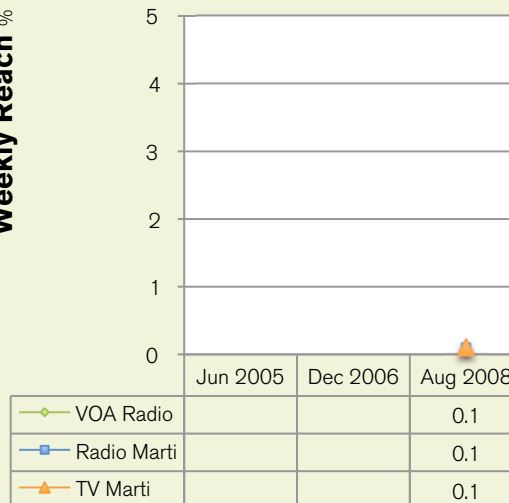
National audience estimates from Cuba are not possible given political conditions. Phone survey data estimate weekly reach among population with land-line phones of $\leq 2\%$ for Radio Marti and $\leq 1\%$ for TV Marti. Miami refugee surveys suggest about one quarter had listened to Radio Marti weekly in Cuba, and 3% to TV Marti. The reality of USIB reach in Cuba is likely somewhere in between these two extremes.

	Radio	TV
VOA	0.003	
Marti	0.003	0.003
USIB	0.003	0.003

Weekly Reach by Media (%)

	VOA	Marti	USIB
Radio	0.1	0.1	0.1
TV	na	0.1	0.1
Internet	na	na	na
Total	0.1	0.2	0.3

Weekly Reach %



Awareness (%)

VOA	Marti
na	na

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)***

	VOA	Marti
Radio	na	na
TV	na	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)***

	VOA	Marti
Current Events	na	na
U.S. Culture	na	na
U.S. Policies	na	na

Quality

Combined Scores from audience panel

	Marti
Radio	3.0
TV	2.9

*Based on an August, 2008 telephone survey of Cuba. These data are representative of adults in households with published phone numbers, estimated at approximately 20% of all Cuban adults.

**Due to differences in sample coverage between the August 2008 survey and previous surveys of Cuba, it is not possible to display trend information.

***Samples of VOA and Marti weekly audience members in the survey are too small for meaningful analysis.

Spanish to Cuba Broadcasting

A U D I E N C E C O M P O S I T I O N

Total Population of Cuba: 11.2 million

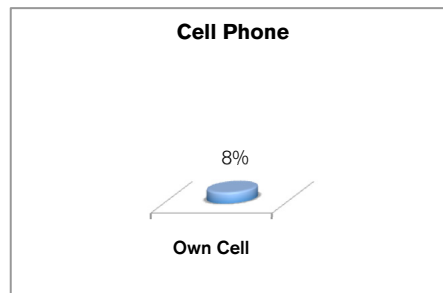
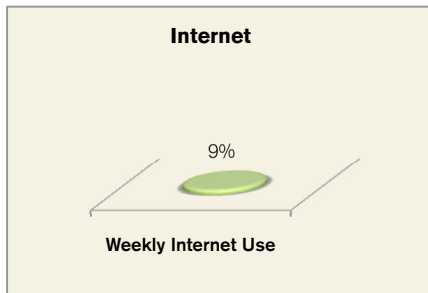
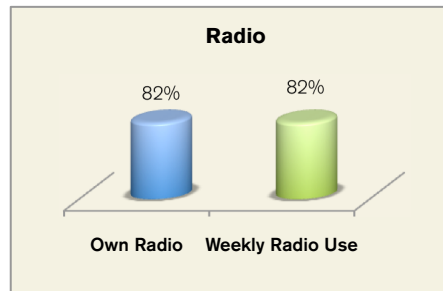
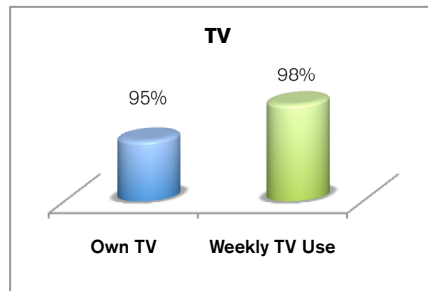
	Sample	VOA Weekly Aud.***	Martí Weekly Aud.***
Sex	%	%	%
Male	47	na	na
Female	53	na	na
Age			
15-24	15	na	na
25-34	16	na	na
35-44	23	na	na
45-54	19	na	na
55-64	16	na	na
65+	12	na	na

	Sample	VOA Weekly Aud.***	Martí Weekly Aud.***
Education	%	%	%
None	< 1	na	na
Primary	6	na	na
Secondary	19	na	na
Associates	20	na	na
Trade	31		
University	24	na	na
Ethnicity/Nationality			
na			

	Sample	VOA Weekly Aud.***	Martí Weekly Aud.***
Residence	%	%	%
na			
Language			
na			

***Samples of VOA and Martí weekly audience members in the survey are too small for meaningful analysis.

M E D I A U S E (Phone Owners)



Top Ten Media Outlet

1. Canal 6 Cuba Vision
2. Canal 2 TV Rebelde
3. Radio Progreso
4. Radio Reloj
5. Radio Rebelde
6. TV Provincial
7. Radio Enciclopedia
8. Radio Emisoras Provinciales
9. Radio Taino
10. Telesur

New Media Index Rankings

Overall Rank	48/54
Wired Rank	34/54
Mobile Rank	54/54

Web Analytics

Weekly Visitors	na
Weekly Visits	na

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: NOT FREE in 2010**
- **Economist Intelligence Unit Instability: MODERATE RISK (4.2) in 2009/2010**
- Since Fidel Castro stepped down in 2008 and conceded the power to his brother Raul Castro no major changes have been implemented. Cuban media remain heavily censored and tightly controlled by the government. Private ownership of electronic media is prohibited by the constitution. The Cuban government actively persecutes human rights activists and dissidents.
- A couple of changes have been made by Raul Castro in the last years is: Cubans who can afford it can now purchase and use mobile phones, stay in tourist hotels, and buy energy-consuming goods such as DVD players. A new television channel called Multivision has also been launched.
- The effects of the regime's announcement in September 2010 that hundreds of thousands of civil servants will be let go to find work in the 'entrepreneurial' sector remain to be seen.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE in (191/196) in 2010**
- **Reporters Without Borders Index: 94.00 (170/175) in 2009**
- The Cuban government continues to jam broadcasts of U.S. government-operated radio and TV stations. Cuba lags behind all other Latin American countries in both Internet use and mobile phone penetration. Cuban laws prohibit listening to and watching Radio and TV Martí, and likely results in artificially low media use rates in surveys.
- Qualitative feedback on TV Martí indicates a desire for TV Martí signals to reach Cuba clearly. Few recent arrivals participating could watch TV Martí and the few who had watched reported that the signal was blurred. Cuban respondents had the opportunity to watch some of the TV Martí programs and most expressed their satisfaction with quality and relevance of these programs.
- Recently arrived Cubans participating in Radio Martí panel discussions found Radio Martí an excellent source of comprehensive and unique information, saying "Radio Martí stands out for depth of reporting and coverage of news from Cuba and for its unique information, particularly interviews inside Cuba."



Broadcasting
Board of
Governors

PROFILE



Voice of America



Language of Broadcast: Spanish

Content: 26 hrs. of original and 1.5 hrs. of repeat radio programming per week; 3.5 hrs. of original and 8.5 hrs. of repeat TV programming per week; Internet

Distribution: 16 affiliates (9 FM, 7 MW), 3 IBB SW frequencies

Radio: VOA produces programming each week which includes live interactive reporting with Union Radio in Venezuela and Radio Panamericana in Bolivia.

Distribution (cont.):

TV: VOA's Spanish programs are regularly featured on such large TV stations as Globovision in Venezuela and NTN 24 in Colombia.

Web: The Service also has a robust web presence with voanoticias.com, a dedicated mobile web page and is active on social media sites such as Facebook, Twitter and YouTube.

Staff: 21

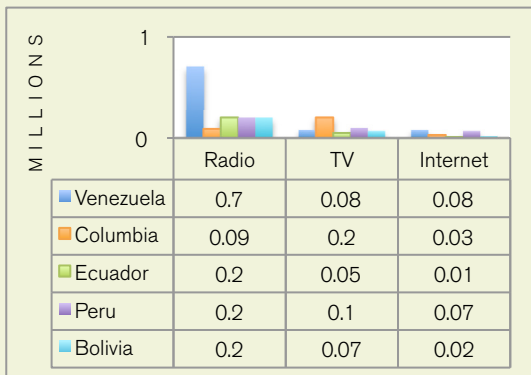
Budget: \$3,389,000

Established: 1941 to 1945; 1946 to 1948; 1953 to 1956 (VOA contracted private radio stations to produce and transmit programs for Latin America); 1960 to present



PERFORMANCE DATA

Audience Size

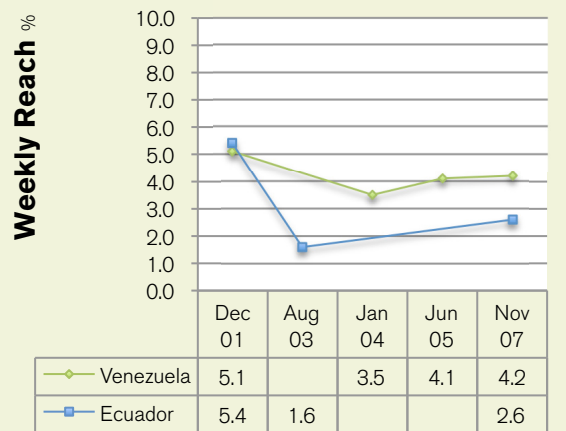


Weekly Reach (%) by Media

	Ven.	Col.	Ecu.	Peru	Bol.
Radio	3.5	1.1	2.1	1.8	5.6
TV	0.4	2.3	0.5	1.0	1.7
Internet	0.4	0.4	0.1	0.5	.5
Total	4.2	3.2	2.6	2.2	6.8

*Data for Credibility and Understanding ratings are not available for these countries.

Weekly Reach



Awareness (%)

Venezuela	Colombia	Ecuador	Peru	Bolivia
na	na	na	na	na

AUDIENCE COMPOSITION

	Venezuela Wkly. Aud.	Colombia Wkly. Aud.	Ecuador Wkly. Aud.	Peru Wkly. Aud.	Bolivia Wkly. Aud.
Sex	%	%	%	%	%
Male	na	41	78	48	66
Female	na	59	22	52	34
Age	%	%	%	%	%
15-24	na	20	20	23	na
25-34	na	19	26	23	na
35-44	na	19	17	23	na
45-54	na	19	17	14	na
55-64	na	24	17	13	na
65+	na	na	2	4	na
Education	%	%	%	%	%
Illiterate/ No Formal	na	na	0	4	1
Elem./Inter.	na	na	11	29	11
Secondary	na	na	52	62	49
Coll./Univ.	na	na	37	5	39

Total Population of
Venezuela 28.4 million
Colombia 45.1 million
Ecuador 13.6 million
Peru 29.2 million
and Bolivia 9.9 million

Data are from surveys of adults (15+) in urban Bolivia (August, 2008); urban Colombia (May, 2008); Ecuador (August, 2007); urban Peru (May, 2008) and Venezuela (November, 2007).

Spanish to Latin America Broadcasting

MEDIA USE

	Venezuela	Bolivia	Colombia	Ecuador	Peru
TV					
Own TV	96%	97%	99%	99%	97%
Own Satellite Dish	4%	5%	16%	2%	3%
Own Cable Access	29%	23%	71%	28%	40%
Weekly TV Use	97%	95%	99%	99%	95%
Weekly TV For News	93%	87%	89%	98%	88%
Radio					
Own Radio	na	92%	95%	94%	95%
Weekly Radio Use	82%	80%	87%	88%	88%
Weekly FM Use	83%	78%	84%	86%	92%
Weekly MW Use	59%	26%	40%	46%	24%
Weekly SW Use	2%	6%	5%	3%	3%
Weekly Radio For News	70%	55%	60%	79%	65%
Internet					
Own PC	18%	31%	56%	32%	26%
Own Internet Access	8%	10%	43%	10%	15%
Weekly Internet Use	19%	32%	53%	23%	41%
Weekly Internet For News	18%	13%	31%	13%	20%
Mobile Phone					
Own Mobile Phone	51%	76%	85%	73%	68%
Weekly Use SMS	44%	na	21%	na	47%
Ever Use Mobile Internet	na	na	7%	na	9%

New Media Index Rankings

Bolivia

Overall Rank	37/54
Wired Rank	28/54
Mobile Rank	45/54

Colombia

Overall Rank	14/54
Wired Rank	6/54
Mobile Rank	32/54

Peru

Overall Rank	30/54
Wired Rank	20/54
Mobile Rank	38/54

Web Analytics

Weekly Visitors	23,155
Weekly Visits	29,281

CONTEXT



Political Situation

- While they have experienced some electoral or parliamentary reverses and divisions among their supporters, the left-wing presidents in Venezuela, Ecuador and Bolivia remain committed to long-term power realignment in the political and economic spheres. Hugo Chavez, in Venezuela, has intensified his anti-U.S. rhetoric and continues to nationalize key sectors of the economy and the media. The relationship between the media and the government of these countries is very tense; the media is perceived as the enemy and journalists and media outlets are constantly attacked. For instance, at the end of last year the government of Ecuador closed TeleAmazonas TV (opposition channel) for three days, though his proposed media law has stalled in the legislature.
- The President of Bolivia has recently been promoting the creation of community radios with more than 40 community radios starting their operations in 2009. The state channel Bolivia TV has been reorganized, producing 90 percent of its own programming, including programs in Quechua and Aymara.

Media Environment

- Television is the most popular mass medium in the Andean region and the most popular source of information. Radio listenership is declining while Internet use is increasing. The only exception is Colombia, which has a well-developed and well-positioned radio market.
- In July 2009, a high-level task force, including several Board members, visited Latin America, identifying specific opportunities for expanded distribution for VOA programs in Peru, Bolivia, Colombia and El Salvador. The task force recommended, among other things, increasing short-format offerings and leveraging nascent opportunities into high-impact affiliate partnerships.
- A TV Monitoring study done this year in Colombia, Ecuador, Peru and Bolivia reveal that viewers are looking for alternatives to CNN in Spanish. Reports adapted for the target area and/or customized for major channels may offer value not available from major commercial sources like CNN.
- There is a clear niche to incorporate well-produced feature segments in VOA partner newscasts. The objectivity, context and concise analysis often lacking in domestic news should be a clear brand characteristic of VOA Noticias.

PROFILE



Language of Broadcast: Swahili

Content: 9.5 hrs. of original radio programming per week; Internet

Distribution: 26 affiliates (26 FM), 2 IBB FM (Nairobi & Kigali) and 2-3 SW frequencies
Two top-rated FM stations in VOA Swahili's target region carry its programming live: Citizen FM in Kenya and Radio Free Africa (RFA) in Tanzania. In addition, the service distributes targeted audio and video programming through mobile devices.

Staff: 7

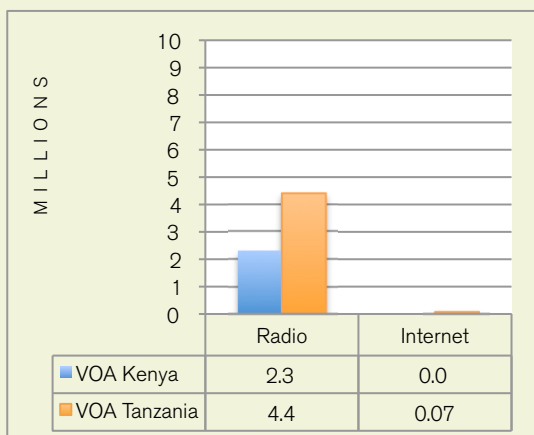
Budget: \$1,142,000

Established: 1962 to present



PERFORMANCE DATA (Using Data from Kenya, April 2009 & Tanzania, March 2010)

Audience Size



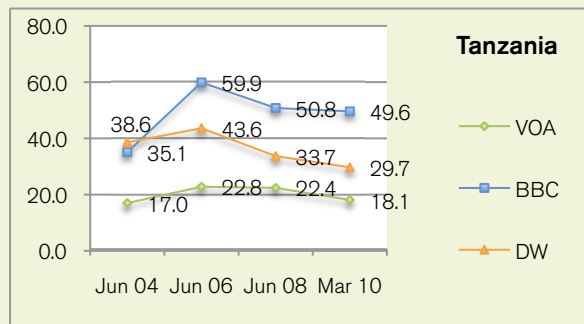
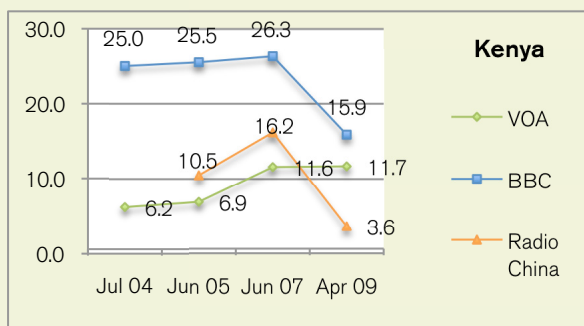
Weekly Reach (%) by Media

	Kenya	Tanzania
Radio	11.7	18.1
TV	na	na
Internet	< .1	0.3
Total	11.7	18.2

Awareness (%)

	Kenya	Tanzania
	48	47

Weekly Reach %



Credibility

Percentage of surveyed weekly audience that found broadcasts credible (%)

	Kenya	Tanzania
Radio	90	99
TV	na	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

	Kenya	Tanzania
Current Events	85	93
U.S. Culture	69	78
U.S. Policies	81	67

Quality

Combined Scores from audience panel

	VOA
Radio	3.1
TV	na

Data are from an April 2009 survey of adults (18+) in Kenya and a March 2010 survey of adults (15+) in Tanzania.

Swahili Broadcasting

A U D I E N C E C O M P O S I T I O N

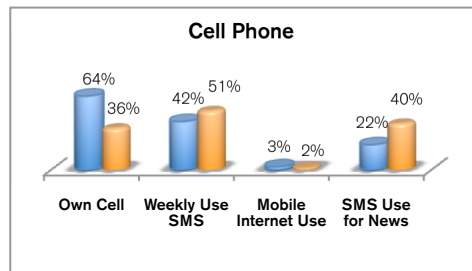
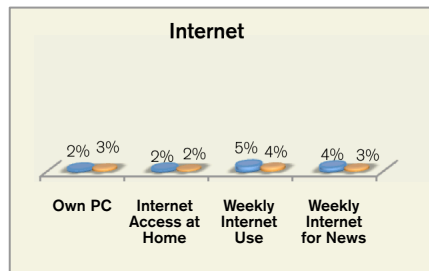
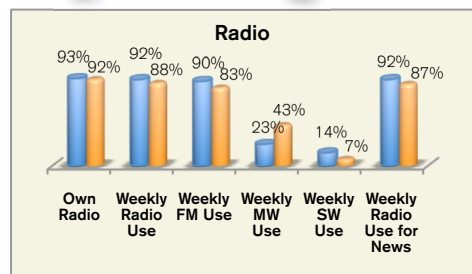
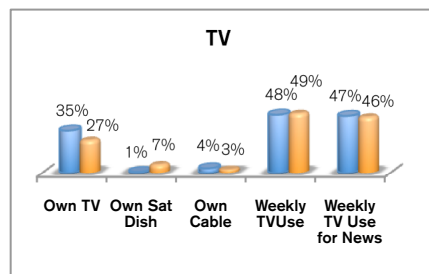
Total Population: Kenya 39.1 M & Tanzania 43.7 M

	Kenya Sam.	Kenya Wkly. Aud.	Tanz. Sam.	Tanz. Wkly. Aud.
Sex	%	%	%	%
Male	49	73	51	67
Female	52	27	49	34
Age				
15-24	34	28	31	28
25-34	25	23	32	32
35-44	15	16	18	16
45-54	11	13	11	15
55-64	8	9	5	7
65+	8	11	3	3

	Kenya Sam.	Kenya Wkly. Aud.	Tanz. Sam.	Tanz. Wkly. Aud.
Educ.	%	%	%	%
None	20	12	8	3
Primary	51	48	58	51
Sec.	23	30	26	32
Higher	6	11	7	13
Ethnicity/Nationality				
Kikuyu	25	23	na	na
Kamba	19	13	na	na
Sukuma	na	na	19	12
Waha	na	na	8	13
Other	56	64	71	75

	Kenya Sam.	Kenya Wkly. Aud.	Tanz. Sam.	Tanz. Wkly. Aud.
Residence	%	%	%	%
Urban	23	32	26	26
Rural	77	68	74	74
Language Spoken at Home				
Swahili	20	32	80	85
Kisukuma	na	na	9	6
English	1	<1	<1	1
Other	79	68	10	9

M E D I A U S E



Top Ten Sources of News (Kenya)

1. Citizen FM
2. Citizen TV
3. KBC Kiswahili
4. KTN
5. KBC
6. Inooro
7. Daily Nation
8. NTV
9. Radio West
10. Coro

Top Ten Sources of News (Tanzania)

1. Radio Free Africa
2. TBC1
3. TBC Taifa
4. ITV
5. Radio One
6. Star TV
7. TBC FM
8. Nipashe
9. Radio Kwizera
10. Mtanzani

New Media Index Rankings

	Kenya	Tanzania
Overall Rank	35/54	45/54
Wired Rank	42/54	52/54
Mobile Rank	18/54	37/54

Google Analytics

Weekly Visitors	521
Weekly Visits	2,161

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index:**
Kenya—PARTLY FREE; Tanzania—PARTLY FREE in 2010
- **Economist Intelligence Unit Instability:**
Kenya—VERY HIGH RISK (7.5);
Burundi—MODERATE RISK (5.9)
- National politics have been getting plenty of media attention as Tanzania approaches general elections in October 2010. The last elections, in 2005, were generally accepted as free and fair, and observers are optimistic about 2010 as well.
- The political situation in the semi-autonomous island of Zanzibar Island region is more tense with lingering animosity after the outcome of the 2005 elections was contested (the losing party only formally recognized the results in late 2009).
- In Kenya, the current power-sharing government has helped ease the tensions that erupted into violence after the disputed 2007 election, and in August 2010, voters elected to change the constitution to include a bill of rights and new limits on presidential power.

Media Environment

- **Freedom House Press Freedom Index:**
Kenya—PARTLY FREE (121/196);
Tanzania—PARTLY FREE (102/196) in 2010
- **Reporters Without Borders Index:**
Kenya—25.00 (96/175); Tanzania—15.50 (62/175) in 2009
- The media environments in both countries are relatively competitive and robust, but still subject to government interference. In particular, media outlets in Tanzania have been targeted for printing stories about corruption in the government, and there have been numerous reports of intimidation and harassment of journalists following the 2007/2008 election violence in Kenya and subsequently.
- In Tanzania, media outlets use primarily Swahili, while Kenyan media have become segmented by language and ethnicity with the expansion of smaller regional radio stations and newspapers.
- While radio remains the leading source of news and information in both countries, television and new media are growing. In Nairobi in particular, Internet and mobile phone use (including mobile web) are increasing rapidly and spawning countless innovations. From the M-PESA mobile money transfer system to the Ushahidi crisis communication tool, Kenya is at the forefront of technological innovation in Africa.



PROFILE



Language of Broadcast: Tajik

Content: 32 hrs. of original and 24 hrs. of repeat radio programming per week; Internet

Distribution: 2 IBB SW frequencies and Satellite

RFE/RL's delivery includes multiple SW frequencies, HotBird, AsiaSat, Yamal in addition to Internet with streaming audio.

Staff: 10

Budget: \$1,574,000

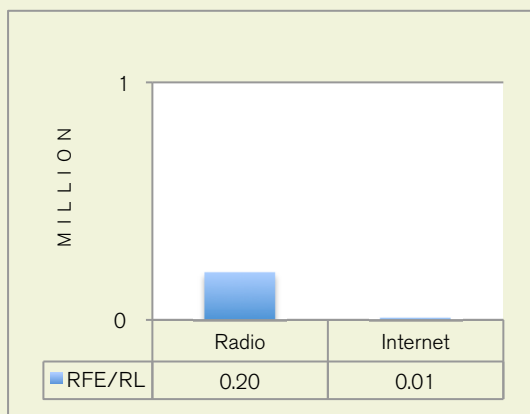
Established: 1953 to present



PERFORMANCE DATA

(Using Data from Tajikistan, August 2009)

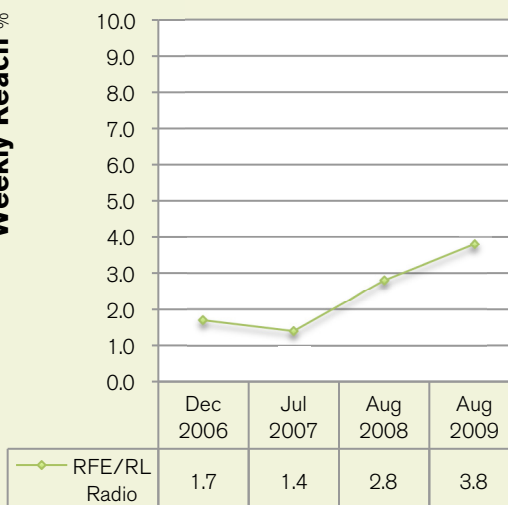
Audience Size



Weekly Reach by Media (%)

RFE/RL	
Radio	3.8
TV	na
Internet	0.2
Total	3.9

Weekly Reach %



Awareness (%)

RFE/RL	
	29

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

RFE/RL	
Radio	89
TV	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

RFE/RL	
Current Events	89
Current Events in Tajikistan	87

Quality

Combined Scores from audience panel

RFE/RL	
Radio	3.3
TV	na

Tajik

Data are from an August 2009 nationwide survey of adults (15+) in Tajikistan.

Tajik Broadcasting

Total Population of Tajikistan: 7.5 million

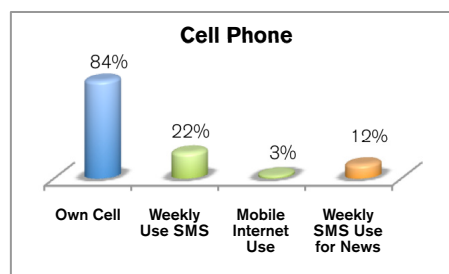
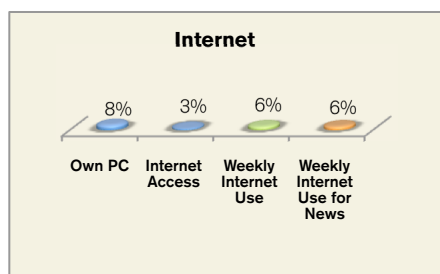
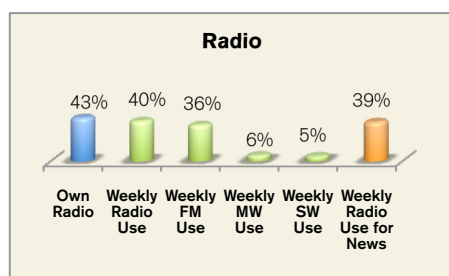
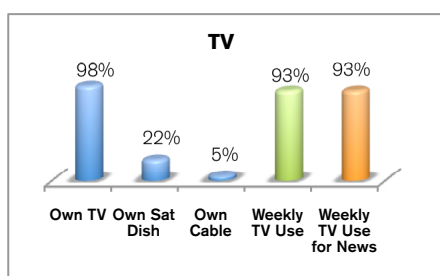
A U D I E N C E C O M P O S I T I O N

	Sample	RFE/RL Weekly Audience
Sex	%	%
Male	45	56
Female	55	44
Age		
15-24	34	36
25-34	26	35
35-44	19	15
45-54	9	11
55-64	6	3
65+	6	0

	Sample	RFE/RL Weekly Audience
Education	%	%
None	8	3
Primary	19	13
Secondary	64	70
Coll./Univ.	9	13
Ethnicity/Nationality		
Tajik	80	87
Uzbek	15	11
Russian	1	0
Other	4	3

	Sample	RFE/RL Weekly Audience
Residence	%	%
Urban	33	19
Rural	67	81
Language		
Tajik	77	85
Russian	3	10
Uzbek	15	1
Other	5	4

M E D I A U S E



Top Ten Media Outlets

1. TVT
2. TV Safina
3. Jahonamo
4. Bakhoristan
5. ORT
6. TV Uzbekistan
7. NTV
8. Yoshlar
9. Sadoi Dushanbe
10. Tajikistan Radio 1

Top Ten Sources of News

1. TVT
2. TV Safina
3. Jahonamo
4. Sadoi Dushanbe
5. Oila
6. Asia ORT
7. Yoshlar
8. Charki gardun
9. Tiroz
10. TV SM-1

New Media Index Rankings

Overall Rank	35/54
Wired Rank	34/54
Mobile Rank	28/54

Web Analytics

Weekly Visitors	8,165
Weekly Visits	38,685

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: NOT FREE in 2010**
- **Economist Intelligence Unit Instability: HIGH RISK (7.1) in 2009/2010**
- President Emomali Rahmon, in power since 1992, continues to control all spheres of political life in Tajikistan. In 2009, Rahmon gave additional power to two of his children – a son and a daughter – by awarding them positions high in the government. The government continues to strictly control the religious activities of its citizens.
- The political situation is largely driven by economic hardship. Both the government and the citizens continue to rely on external sources of support. The worldwide economic crisis brought many Tajik workers home, and remittances from Russia and Kazakhstan decreased significantly. Sixty-six percent cited unemployment and 17 percent cited low wages as the most serious problem affecting the country.
- The country suffers constant energy shortages that intensified at the end of 2009, when Uzbekistan decided to withdraw from the unified Central Asian power grid because of tension with Tajikistan over common water resources.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (169/196) in 2010**
- **Reporters Without Borders Index: 32.00 (113/175) in 2009**
- As recently as 2008 the government tolerated independent media. Since then, the Tajik government has formally and informally extended its control over virtually all media outlets. Local journalists are not protected from government persecution and many risk being sued for criticizing the government or individual politicians.
- With little balance and a lack of opposing viewpoints, the public is exposed mostly to pro-government reports. President Rahmon has the broadest access to local TV, newspapers and radio of anyone in the country. The population learns about developments unrelated to government work through rumors and often with a delay.
- The rural population, in particular, has limited choice of media outlets due to the high cost of newspapers and satellite dishes. Most newspapers publish only weekly and are not distributed outside of urban areas. TV is traditionally the most widespread source for news and information. However, with frequent electricity outages in rural areas, even TV and radio are often unavailable.
- Weekly Internet use grew from 3.5 percent weekly to 5.9 percent between 2008 and 2009. However, Tajikistan's online resources lack diversity; only a few websites provide timely news reports and analysis in Tajik. Most Internet users generally browse in Russian.



PROFILE



RadioFreeEurope
Radioliberty



Language of Broadcast: Tatar-Bashkir

Content: 8 hrs. of original and 20 hrs. of repeat radio programming per week; Internet

Distribution: 1 to 2 IBB SW frequencies

RFE/RL's delivery includes multiple SW frequencies, HotBird, AsiaSat plus 1 cross-border FM affiliate in Ukraine in addition to Internet with streaming audio (Cyrillic site with Latin page).

Staff: 6

Budget: \$990,000

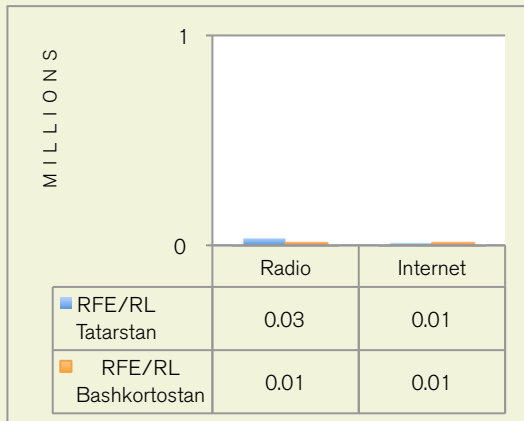
Established: 1953 to present



PERFORMANCE DATA

(Using Data from Tatarstan, October 2009)

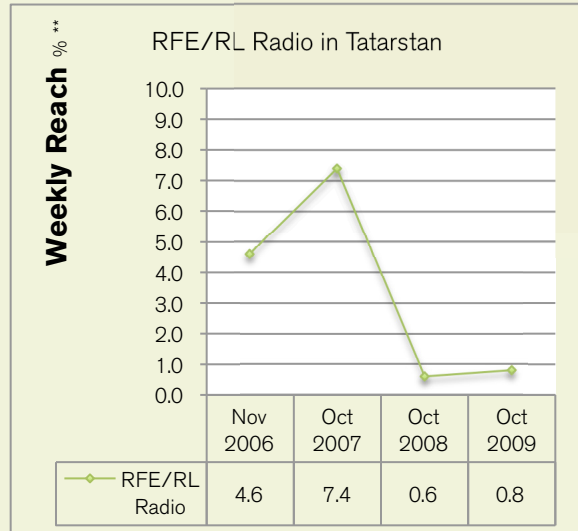
Audience Size



Weekly Reach by Media (%)

	Tatarstan	Bashkortostan
Radio	0.8	0.1
TV	na	na
Internet	0.3	0.1
Total	1.1	0.2

Weekly Reach % **



Awareness (%)

RFE/RL
23

Credibility

Percentage of surveyed weekly audience that found broadcasts credible (%)*

	Tatarstan	Bashkortostan
Radio	na	na
TV	na	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)*

	Tatarstan	Bashkortostan
Current Events in Country	na	na
U.S. Culture	na	na
U.S. Policies	na	na

Quality

Combined Scores from audience panel*

	RFE/RL
Radio	2.7
TV	na

*Samples of RFE/RL weekly listeners are too small for meaningful analysis.
**Media use figures are for Tatarstan only.

Data are from an October 2009 survey of adults (15+) in Tatarstan and an October 2008 survey of adults (15+) in Bashkortostan.

Tatar-Bashkir Broadcasting

A U D I E N C E C O M P O S I T I O N

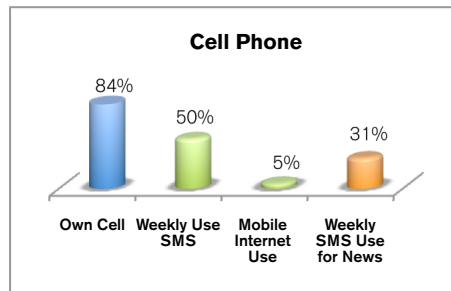
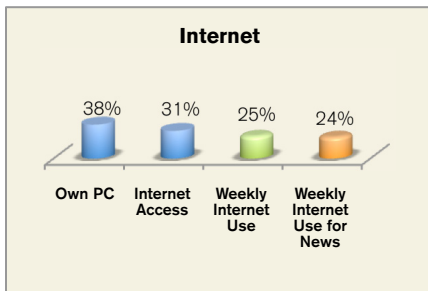
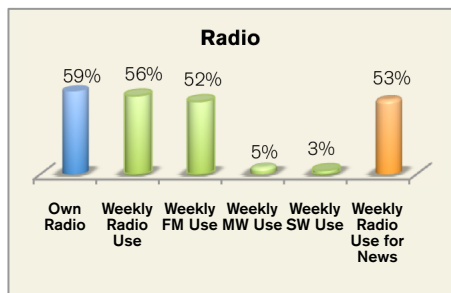
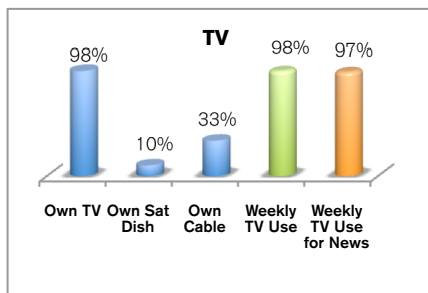
Total Population of Tatarstan: 3.7 M , Bashkortostan 4.1M

	Sample	RFE/RL Weekly Audience*
Sex	%	%
Male	45	na
Female	54	na
Age		
15-24	20	na
25-34	16	na
35-44	16	na
45-54	18	na
55-64	14	na
65+	16	na

	Sample	RFE/RL Weekly Audience*
Education	%	%
None/Primary	6	na
Secondary/Vocational	54	na
Spec. Tech/ Inc. Higher	23	na
Coll./Univ.	17	na
Ethnicity/Nationality		
Tatar	53	na
Russian	39	na
Other	8	na

	Sample	RFE/RL Weekly Audience*
Residence	%	%
Urban	74	na
Rural	26	na
Language		
Tatar	36	na
Russian	62	na
Other	3	na

M E D I A U S E **



Top Ten Media Outlets

1. ORT
2. RTR
3. TNV
4. NTV
5. EFIR
6. STS
7. TNT
8. GTRK Tatarstan
9. Radio Novyi Vek
10. REN-TV

Top Ten Sources of News

1. ORT
2. RTR
3. NTV
4. TNV
5. EFIR
6. www.yandex.ru
7. www.mail.ru
8. Russkoe Radio
9. GTRK Tatarstan
10. Radio Novyi Vek

New Media Index Rankings (Tatarstan)

Overall Rank 24/54
Wired Rank 20/54
Mobile Rank 28/54

Web Analytics

Weekly Visitors 1,737
Weekly Visits 5,432

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: NOT FREE in 2010 (Russia)**
- **Economist Intelligence Unit Instability: HIGH RISK (6.5) in 2009/2010 (Russia)**
- In the overall censored Russian media environment, Tatarstan is one of the most restricted territories in terms of democratic freedom. After almost a decade of relative independence from the federal government, the Kremlin has regained budgetary and political control over the region. Corruption, lawlessness, and family ties define appointments to the administrative positions.
- The regional administration suppresses any attempts to criticize local or federal authorities. Local authorities are eagerly using the newly-introduced misdemeanors – "dissemination of false information," "extremism," and "violation of privacy" – to harass journalists and shut down independent media. Independent and state-owned outlets alike practice high-levels of self-censorship.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (175/196) in 2010 (Russia)**
- **Reporters Without Borders Index: 60.88 (153/175) in 2009 (Russia)**
- The media environment is heavily dominated by media outlets owned by the Russian government. Independent media outlets are starved of funds and dependant on advertising revenue. However, even in the field of advertisement, the state media is generously funded and has definitive advertising price advantages.
- TV is the most-used media source for news and information with universal daily and weekly reach among Tatar-Bashkir speakers. Most Tatar-Bashkir speakers consider Russian-language media outlets – mainly, pro-Kremlin and anti-Western Perviy Kanal and Rossiya – their top sources of information.
- Tatar-Bashkir speakers tend to use radio and newspapers more frequently than do the Russian-speaking population, and while penetration is still low, general use of the Internet is rising.
- With growing pressure on the media and limited distribution opportunities, broadcasting to Tatarstan and Bashkortostan is increasingly challenging. Since RFE/RL's Tatar-Bashkir Service lost all forms of FM distribution in Tatarstan in early 2008, it is wholly dependent on shortwave. Therefore, 2008 marked the start of a strategic shift from a predominantly "radio-first" product to putting more emphasis on the web as the primary platform for the future.



PROFILE



Voice of America®



Language of Broadcast: Thai

Content: 9.5 hrs. of original radio programming per week; 12 min. of repeat TV programming per week; Internet

Distribution: 4 affiliates (3 FM, 1 MW)

Radio: The Service has 3 different radio programs: *Hotline News from VOA Washington*, *Weekend with VOA*, and *English American Style*, a weekly show which teaches American idioms.

TV: VOA Thai Service's *Report from America* and *Eye on America* are broadcast on TNN 24, the only cable TV in Thailand, modeled after CNN. TNN 24 and its network has 1.5 million subscribers (2008 data).

Web: Programs are also available at voanews.com/thai, 3 audio podcasts available on My Yahoo, iTunes, and from the Service's web site.

Staff: 5

Budget: \$748,000

Established: 1942 to 1958; 1962 to 1988; 1988 to present



PERFORMANCE DATA *

Audience Size

MILLIONS

VOA

Current audience data from Thailand do not exist. However, a full national survey is planned for November 2010. A 2005 survey of greater Bangkok indicated a VOA total media reach of 2.5%.

	Radio	Internet
VOA		

Weekly Reach by Media (%)

VOA	
Radio	na
TV	na
Internet	na
Total	na

Weekly Reach %

VOA

Current audience data from Thailand do not exist. However, a full national survey is planned for November 2010. A 2005 survey of greater Bangkok indicated a VOA total media reach of 2.5%.

VOA	Jun 2005
-----	----------

Awareness (%)

VOA	
	12

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

VOA	
Radio	na
TV	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

VOA	
Current Events	na
U.S. Culture	na
U.S. Policies	na

Quality

Combined Scores from audience panel

VOA	
Radio	3.8
TV	na

*The last available survey indicated a total media weekly reach figure of 2.5% for the VOA Thai service in Greater Bangkok.

No quantitative research has been conducted for the VOA Thai service since a June 2005 survey of Greater Bangkok.

Thai Broadcasting

Total Population of Thailand: 67.8 million

A U D I E N C E C O M P O S I T I O N

	Sample*	VOA Weekly Audience*
Sex	%	%
Male	na	na
Female	na	na
Age		
15-24	na	na
25-34	na	na
35-44	na	na
45-54	na	na
55-64	na	na
65+	na	na

	Sample*	VOA Weekly Audience*
Education	%	%
Primary or less	na	na
Junior School	na	na
High School	na	na
Vocational		
Coll./Univ.	na	na
Ethnicity/Nationality		
Thai	na	na
Other	na	na

	Sample*	VOA Weekly Audience*
Residence	%	%
Urban	na	na
Rural	na	na
Language		
Thai	na	na
Other	na	na

*The last available survey indicated a total media weekly reach figure of 2.5% for the VOA Thai service in Greater Bangkok.

M E D I A U S E

TV
Media use data is not available.

Radio
Media use data is not available.

Internet
Media use data is not available.

Cell Phone
Media use data is not available.

New Media Index Rankings

Overall Rank na/54

Wired Rank na/54

Mobile Rank na/54

Web Analytics

Weekly Visitors 3,732

Weekly Visits 5,819

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: PARTLY FREE in 2010**
- **Economist Intelligence Unit Instability: HIGH RISK (7.0) in 2009/2010**
- Thailand experienced large scale social and political unrest from March through May of 2010. In an attempt to dissolve the Democrat party-led government, the UDD or "Red Shirts" organized the largest protests in Thai history on March 14th 2010. The initially peaceful protests became increasingly violent as the two sides failed to set an election date. The ruling government responded by tightening security and censoring media outlets. The unrest culminated in an armed crack down on May 19th in which UDD leaders surrendered.
- Although the protests and violence have subsided, checks on free speech and tight media censorship persist in the wake of the crisis.

Media Environment

- **Freedom House Press Freedom Index: PARTLY FREE (124/196) in 2010**
- **Reporters Without Borders Index: 44.00 (130/175) in 2009**
- Thailand has one of the most dynamic media environment in Southeast Asia. There are hundreds of FM and TV stations in operation, some of them without licenses.
- It has long been illegal to insult the king or royal family in Thailand, and journalists do get arrested for it, the latest in September 2010.
- As a result of the recent unrest, Thai authorities began blocking and censoring a variety of websites critical to the monarchy. The leadership went as far as to block Facebook and Twitter, which became alternative sources for news and information as other websites proved inaccessible and TV began broadcasting only state-controlled programming. There were many reports of violence against journalists attempting to report on the unrest, and at least two journalists were killed.



Broadcasting
Board of
Governors

PROFILE



Voice of America



Language of Broadcast: Tibetan

Content: 42 hrs. of original and 126 hrs. of repeat radio programming per week; 2 hrs. of original TV programming per week; Internet

Distribution:

Radio: The service broadcasts 6 hours of original radio on as many as four IBB SW frequencies, and is also available via satellite and on the Internet.

TV: VOA *Kunleng*, is the only Tibetan language television program in Tibet not controlled by the Chinese Communist Party. It is viewed in all 3 major Tibetan regions.

Staff: 22

Budget: \$3,455,000

Established: 1991 to present



Radio Free Asia



Language of Broadcast: Tibetan (in 3 major dialects of Amdo, Kham and Utsang)

Content: 37 hrs. of original and 33 hrs. of repeat radio programming per week; Satellite rebroadcasting; Internet

Distribution: 3- 5 IBB SW frequencies; Satellite rebroadcasting

Staff: 36

Budget: \$5,444,000

Established: 1996 to present



PERFORMANCE DATA*

(Using Data from Tibetan refugees Jan.-Dec. 2009)

Audience Size

MILLIONS

Political conditions in China's Tibetan Autonomous Region (TAR) make it impossible to conduct any research to measure RFA's or VOA's audience there. Any performance data herein are results of a refugee survey in Nepal and not projectable to any population

	Radio	Internet
VOA		
RFA		
USIB		

Weekly Reach by Media (%)

	VOA	RFA	USIB
Radio	2.3	5.3	5.6
TV	5.3	na	5.3
Internet	na	na	na
Total	6.6	5.3	8.1

Weekly Reach %

Political conditions in China's Tibetan Autonomous Region (TAR) make it impossible to conduct any research to measure RFA's or VOA's audience there. Any performance data herein are results of a refugee survey in Nepal and not projectable to any population

VOA Radio & TV	
RFA Radio	

Awareness (%)

VOA	RFA
28	24

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

	VOA	RFA
Radio	na	na
TV	na	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

	VOA	RFA
Current Events	na	na
U.S. Culture (VOA) or Current Events in Region (RFA)	na	na
U.S. Policies	na	na

Quality

Combined Scores from audience panel

	VOA	RFA
Radio	3.3	3.2
TV	3.4	na

*Data are from a non-probability sample of Tibetan refugees in Nepal and cannot be used to project audience size or for trend analysis.

**Official 2000 census data suggest 2.4 million of the 5.4 million Tibetans in the PRC live in the Tibetan Autonomous Region (TAR), which consists of the provinces of Amdo, Kham and Utsang.

Data are from a non-probability sample of newly arrived Tibetan refugees in Nepal, conducted from January-December 2009.

Tibetan Broadcasting

Total Population of Tibet Province: See note**

A U D I E N C E C O M P O S I T I O N **

	Sample	VOA Weekly Aud.	RFA Weekly Aud.
Sex	%	%	%
Male	60	90	90
Female	40	10	10
Age			
15-29	62	37	41
30-44	22	45	40
45-59	8	16	11
60+	8	3	7

	Sample	VOA Weekly Aud.	RFA Weekly Aud.
Education	%	%	%
None/Informal	49	32	21
Elementary	24	21	26
Secondary	10	8	9
Coll./Univ.	2	8	10
Monastic	17	32	34
Region of Origin			
Amdo	20	29	54
Kham	60	55	33
Utsang	20	16	13

	Sample	VOA Weekly Aud.	RFA Weekly Aud.
Residence	%	%	%
Urban	9	5	7
Rural	68	42	50
Nomadic	23	53	43
Language			
na	na	na	na

**Official 2000 census data suggest 2.4 million of the 5.4 million Tibetans in the PRC live in the Tibetan Autonomous Region (TAR), which consists of the provinces of Amdo, Khamke and Utsang.

M E D I A U S E

TV
Media use data is not available.

Radio
Media use data is not available.

Internet
Media use data is not available.

Cell Phone
Media use data is not available.

New Media Index Rankings

Overall Rank	na/54
Wired Rank	na/54
Mobile Rank	na/54

Web Analytics

VOA Weekly Visitors	2,710
Weekly Visits	13,465
RFA Weekly Visitors	3,315
Weekly Visits	10,427

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: NOT FREE in 2010 (China)**
- **Economist Intelligence Unit Instability: MODERATE RISK (4.8) in 2009/2010 (China)**
- As part of an ongoing effort to win the hearts and minds of Tibetans—and since 2000, as part of the Western Development Strategy, Beijing's policy to develop the western regions of China has resulted in massive investment in huge infrastructure projects such as the Lhasa-Golmud railway; extensive road networks; housing projects and the gradual 'urbanization' of rural and nomadic populations.
- Without political reforms to accompany this process, social tensions have increased as local Tibetans see little of the prosperity and growth, while ethnic Chinese, who have also been encouraged to migrate to Tibetan areas, have seen their wealth generally increase.
- The combination of policies and measures the Chinese Government has introduced in the Tibetan autonomous areas of the PRC, largely unpopular with the ethnically Tibetan populations, resulted in the well-publicized protests in March 2008, which gave rise to the death, injury and detention of many Tibetans. Since this time, the Chinese regime has increased its control.
- According to the State Department's 2009 report, "The government's human rights record in Tibetan areas of the PRC remained poor and the severe repression of freedoms of speech, religion, association and movement that increased dramatically following the March 2008 Lhasa riots and subsequent unrest that occurred across the Tibetan Plateau continued during the year. Authorities continued to commit serious human rights abuses, including extrajudicial killings, torture, arbitrary arrests, extrajudicial detention and house arrest. The preservation and development of Tibet's unique religious, cultural and linguistic heritage remained a concern."
- Further restricting freedom of speech, authorities routinely monitor all electronic communications including telephone conversations, fax transmissions, email, text messaging and Internet communications. Authorities also open and censor domestic and international mail. Security services routinely monitor and enter residences and offices to gain access to computers telephones and fax machines.
- A few months after the 2008 protests, authorities said there would be severe penalties for spreading and listening to 'rumors.' Several Tibetans were sentenced to lengthy prison sentences for unlawfully providing 'intelligence' to organizations outside of the PRC.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (181/196) in 2010 (China)**
- **Reporters Without Borders Index: 84.50 (168/175) in 2009**
- Satellites have been widely used by Tibetans in some regions both for domestic and international channels. When available, the clear signals both for audio and video content make satellite the preferred platform for U.S. broadcasts. This has been particularly true in the Amdo region of Tibet, which was at the forefront of the 2008 protests.
- Within the Tibetan-speaking regions of the PRC, local media outlets continue to proliferate—authorities have increased the number of Tibetan-language broadcasts on television and radio, as well as the number of Tibetan-language newspapers.
- Throughout the Tibetan autonomous areas of the PRC and beyond, there are intensified jamming efforts and increased restrictions on access to foreign news websites. On domestic media outlets, the government has increased censorship and manipulation of the press and the Internet, particularly around sensitive anniversaries; new interpretations of criminal laws have been used to limit discussions deemed as passing of intelligence injurious to the state.
- International radio broadcasts are still subject to considerable and, arguably, more intense jamming, particularly VOA and RFA Tibetan and Chinese broadcasts, as well as Voice of Tibet's Tibetan language broadcasts.
- Authorities also target satellite use. For example, in June 2009 in Tibetan areas of southern Gansu Province and the Kardze (Ganzi) Tibetan Autonomous Prefecture, Sichuan Province, police confiscated or destroyed satellite dishes suspected of receiving VOA Tibetan-language television, as well as VOA and RFA audio satellite channels. Recognizing the power of satellite television, authorities are rolling out alternative strategies, such as providing free cable connections or small Ku-band satellite dishes (which are intended to thwart reception of foreign channels).
- Although Internet use in the PRC is increasing with the China Internet Network Information Center (CNNIC) estimating some 384 million users by the end of December 2009, authorities take extreme measures to prevent Tibetans from receiving information originating outside of the PRC. The sophisticated control and surveillance system for Internet content, the so-called "Great Firewall"—is highly proficient. The PRC is now the world's biggest prison for cyber-dissidents with a total of 57 currently held, five of whom are Tibetans.
- As in other repressive environments, information in Tibet is widely shared through word-of-mouth. Qualitative research also suggests that digital content is printed and shared on thumb drives and CDs.

PROFILE



Language of Broadcast: Turkish

Content: 3.25 hrs. of original and 2 hrs. of repeat radio programming per week; 1.5 hrs. of original TV programming per week; Internet

Distribution: 2 affiliates (1 FM, 1TV)

TV: TGRT News TV network, the 7th largest in Turkey, carries live, VOA Turkish shows each week. VOA Turkish also presents live webcam report via Skype and a weekly news and magazine show on TGRT News TV.

Radio: Programming carried by NTV FM, Turkey's largest privately owned radio news network, which covers 35 provincial centers or approximately 50 million people. Also, 1.5 hours of weekly radio programming is presented as podcasts via mobile platform and Internet.

Staff: 8

Budget: \$1,378,000

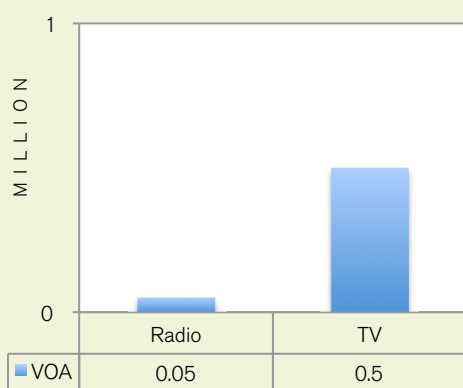
Established: 1942 to 1945; 1948 to present; TV service established in 2005



PERFORMANCE DATA

(Using Data from Turkey, June 2009)

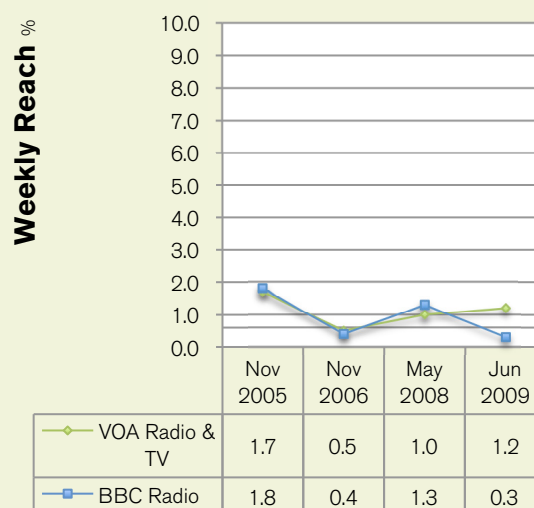
Audience Size



Weekly Reach by Media (%)

VOA	
Radio	0.1
TV	1.0
Internet	<0.1
Total	1.2

Weekly Reach



Awareness (%)

VOA	
	8

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)*

VOA	
Radio	na
TV	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

VOA TV	
Current Events	na
U.S. Culture	na
U.S. Policies	na

Quality

Combined Scores from audience panel

VOA	
Radio	3.6
TV	3.4

* Samples of VOA audience are too small for meaningful analysis.

Data are from a June 2009 nationwide survey of adults (15+) in Turkey.

Turkish Broadcasting

Total Population of Turkey: 74.8 million

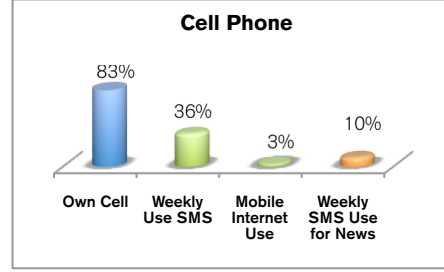
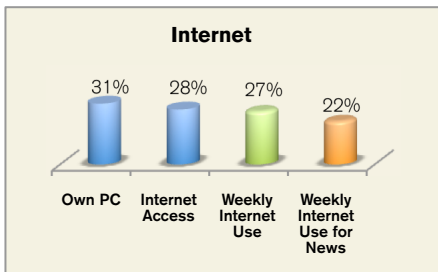
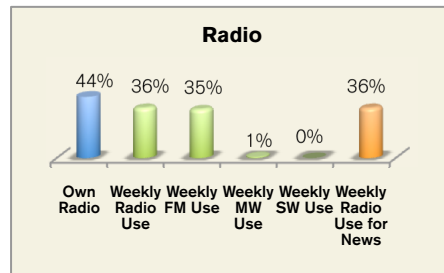
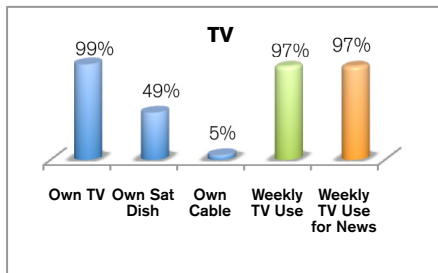
A U D I E N C E C O M P O S I T I O N *

	Sample	VOA TV Weekly Audience
Sex	%	%
Male	50	na
Female	50	na
Age		
15-24	18	na
25-34	25	na
35-44	20	na
45-54	16	na
55-64	12	na
65+	9	na

	Sample	VOA TV Weekly Audience
Education	%	%
illiterate/No Formal	10	na
Elem./Inter.	44	na
Secondary	37	na
Coll./Univ.	10	na
Ethnicity/Nationality		
na		

	Sample	VOA TV Weekly Audience
Residence	%	%
Urban	71	na
Rural	29	na
Language		
na		

M E D I A U S E



Top Ten Media Outlets

1. Show TV
2. Kanal D
3. ATV
4. Star
5. TRT 1
6. NTV
7. TGRT
8. TGRT / Haber
9. CNN International
10. Kanal 6

New Media Index Rankings

Overall Rank	17/54
Wired Rank	9/54
Mobile Rank	32/54

Web Analytics

Weekly Visitors	5,446
Weekly Visits	8,904

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: PARTLY FREE in 2010**
- **Economist Intelligence Unit Instability: HIGH RISK (6.8) in 2009/2010**
- In August 2007, the Islamic-oriented Abdullah Gul was elected president of Turkey, sparking vocal opposition from supporters of laicism (secularism) in Turkey. The military, in particular, has frequently warned it would intervene to protect the secular system. The show of force between the government and the military, including the government's charging of seven high ranking officers for an attempted coup in February 2010, has created political tensions and instability. Additionally, Turkey's Kurdish population of 12 million continues to demand constitutional recognition of its ethnic identity and improved treatment. Turkey has repeatedly refused to grant these demands, but has recently initiated further democratic and cultural rights for its Kurdish population.
- Internationally, Turkey has traditionally been an ally of the United States, but has recently become more supportive of alternative policies, such as easing of the nuclear standoff with Iran. Turkey's Prime Minister accused Israel of "state terrorism" in the June 2010 flotilla raid, raising alarms for the American administration, which sees this event as a sign that he is aligning himself with Islamic rivals of the West.

Media Environment

- **Freedom House Press Freedom Index: PARTLY FREE (106/196) in 2010**
- **Reporters Without Borders Index: 38.25 (123/175) in 2009**
- Turkey has a vibrant media environment where local radio stations, print publications and numerous public and hundreds of private terrestrial and satellite television channels thrive. The government has increasingly liberalized the media environment, despite conservative pressure to restrict outlets deemed offensive to cultural, religious and political sensibilities.
- Television is the predominant source of news and information, and 9 out of 10 watch it daily for news. Internet use is predictably rising, and 78% of home users say they have broadband.



PROFILE



RadioFreeEurope
RadioLiberty



Language of Broadcast: Turkmen

Content: 14 hrs. of original and 42 hrs. of repeat radio programming; Internet

Distribution: RFE/RL's delivery includes 1 cross-border MW from Armenia covering the entire country, multiple SW frequencies, Yamal, HotBird, AsiaSat and Internet with proxies and streaming audio.

Staff: 9

Budget: \$1,570,000

Established: 1953



PERFORMANCE DATA

(Using Data from Turkmenistan, March 2010)

Audience Size

MILLIONS

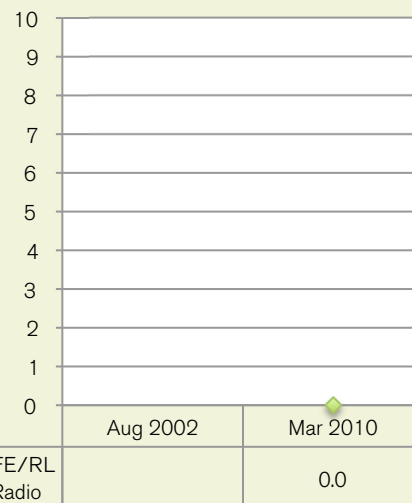
These audience figures are based on surveys conducted in politically repressive environments, generally hostile to international broadcasting. Because individuals in these countries are discouraged and even prohibited from listening to foreign broadcasts, audience figures may be higher than ones cited here.

	Radio	Internet
RFE/RL	0.0	

Weekly Reach by Media (%)

	RFE/RL
Radio	na
TV	na
Internet	na
Total	na

Weekly Reach % *



Awareness (%)

	RFE/RL
	na

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

	RFE/RL
Radio	na
TV	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

	RFE/RL
Current Events	na
Current Events in Turkmenistan	na
U.S. Policies	na

Quality

Combined Scores from audience panel

	RFE/RL
Radio	3.0
TV	na

*Insufficient data for trend analysis.

**Sample of RFE/RL weekly listeners in the survey is too small for meaningful analysis.

Data are from a March 2010 survey of adults (15+) in urban Turkmenistan.

Turkmen Broadcasting

Total Population of Turkmenistan: 5.2 million

A U D I E N C E C O M P O S I T I O N

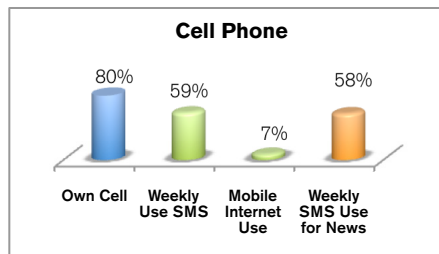
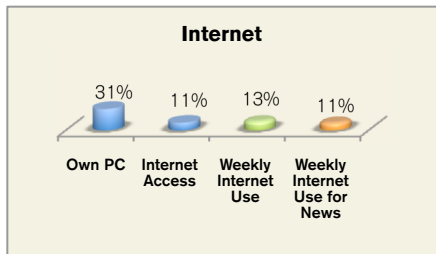
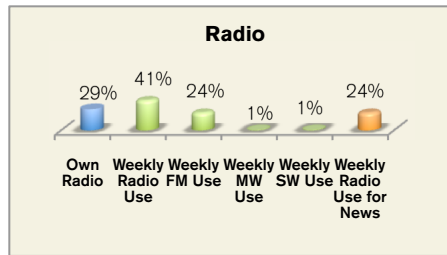
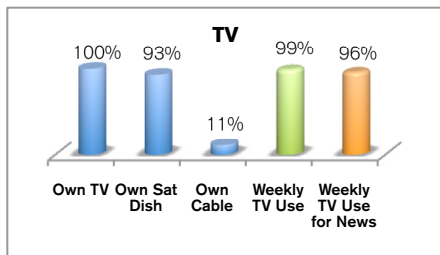
	Sample	RFE/RL Weekly Audience**
Sex	%	%
Male	48	na
Female	52	na
Age		
15-24	27	na
25-34	31	na
35-44	16	na
45-54	18	na
55-64	6	na
65+	2	na

	Sample	RFE/RL Weekly Audience**
Education	%	%
None/Primary	12	na
Secondary	44	na
Vocational	26	na
Coll./Univ.	18	na
Ethnicity/Nationality		
Turkmen	69	na
Russian	16	na
Uzbek	6	na
Other	8	na

	Sample	RFE/RL Weekly Audience**
Residence	%	%
Urban	100	na
Rural	na	na
Language		
Turkmen	63	na
Russian	32	na
Other	5	na

**Sample of RFE/RL weekly listeners in the survey is too small for meaningful analysis.

M E D I A U S E



Top Ten Media Outlets

1. NTV
2. RTR
3. ORT-1 Evraziya
4. TV Turkmen Owazy
5. TV Altyn Asyr Turkmenistan
6. TV Ren
7. TV Yaslyk
8. TV Miras
9. Channel 4 Turkmenistan
10. TNT

New Media Index Rankings

Overall Rank	na/54
Wired Rank	na/54
Mobile Rank	na/54

Web Analytics

Weekly Visitors	760
Weekly Visits	2,549

C O N T E X T

↓ **Stability**

↓ **Political Freedom**

↓ **Press Freedom**

↓ **Ease of Distribution**

↓ **Competition**

Political Situation

- **Freedom House Political Freedom Index: NOT FREE in 2010**
- **Economist Intelligence Unit Instability: HIGH RISK (6.2) in 2009/2010**
- President Berdymukhammedov, who came into office after Niyazov's death, focuses on ending the country's isolation and promoting the global position of Turkmenistan by using its natural gas reserves as leverage in political negotiations. In December 2009, Turkmenistan opened a pipeline to China, ending Russian monopoly on gas exports there and initiating the negotiations on potential gas exports to Europe.
- As relations between Turkmenistan and Russia have cooled, Turkmenistan has turned to NATO and the USA with an offer to provide logistical support for military activities in Afghanistan.
- Berdymukhammedov's efforts to improve Turkmenistan's internal situation are inconsistent and produce only modest outcomes. Turkmenistan's democratization process has stagnated, even though the new president succeeded in phasing out Niyazov's cult of personality. Elections are not free and fair, and corruption remains widespread.
- Civil liberties in the country are severely restricted: freedom of speech, academic freedom, freedom of religion, and freedom of association are not guaranteed. As the government promotes Turkic identity, all minorities are restricted in their access to education, employment, and public services.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (194/196) in 2010**
- **Reporters Without Borders Index: 107.00 (173/175) in 2009**
- The government controls all broadcasts and printed media and the judicial system persecutes both independent media and non-government agencies involved in social or political activities.
- TV is the leading media in Turkmenistan with almost universal weekly reach. Radio listening in urban Turkmenistan is relatively high at 41 percent weekly; the majority listen on FM. However, only a quarter of the population relies on radio when following current events; the rest use it as a source of entertainment.



Broadcasting
Board of
Governors

PROFILE



Voice of America™



Language of Broadcast: Ukrainian

Content: 2.5 hrs. of original and 0.75 hrs. of repeat TV programming per week; Internet

Distribution:

7 TV affiliates; VOA Ukrainian produces the daily *Chas-Time* TV news program and the weekly *Window on America* TV magazine program. *Chas-Time* and *Window on America* are seen nationally on Channel 5 and the later on Channel 1, the state-run broadcaster. Occasional special reports to some of Ukraine's biggest networks are also provided.

Staff: 12

Budget: \$1,783,000

Established: 1949 to present;
TV service established in 1992



RadioFreeEurope
RadioLiberty



Language of Broadcast:

Ukrainian

Content: 15 hrs. of original and 8 hrs. of repeat radio programming per week; Internet

Distribution:

8 affiliates (3 UKW & 5 FM)

Staff: 13

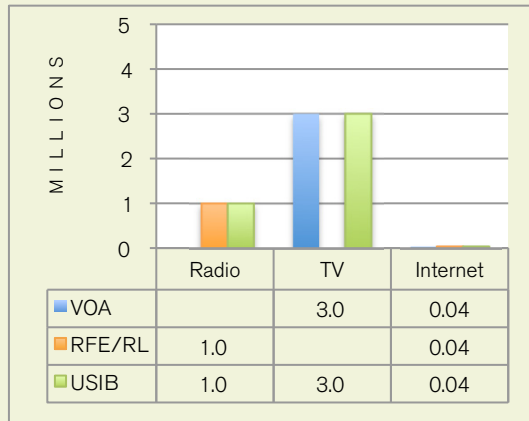
Budget: \$2,896,000

Established: 1954 to present



PERFORMANCE DATA (Using Data from Ukraine, October 2009)

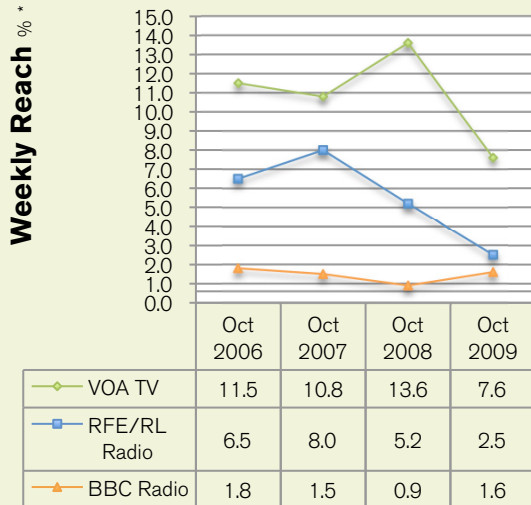
Audience Size



Weekly Reach By Media (%)

	VOA	RFE/RL	USIB
Radio	na	2.5	2.5
TV	7.6	na	7.6
Internet	0.1	0.1	0.1
Total	7.8	2.5	9.1

Weekly Reach %



Awareness (%)

VOA	RFE/RL
74	54

Credibility

	VOA	RFE/RL
Radio	na	93
TV	90	na

Understanding

	VOA	RFE/RL
Current Events	74	54
U.S. Culture (VOA) or Current Events in Ukraine (RFE/RL)	74	73
U.S. Policies	70	na

Quality

	VOA	RFE/RL
Radio	3.7	3.4
TV	3.5	na

*Weekly reach for VOA included radio and TV until October, 2009.

**Samples of VOA radio and RFE/RL TV weekly audiences in the survey are too small for meaningful analysis.

Data are from an October 2009 nationwide survey of adults (15+) in Ukraine.

Ukrainian Broadcasting

Total Population of Ukraine: 46 million

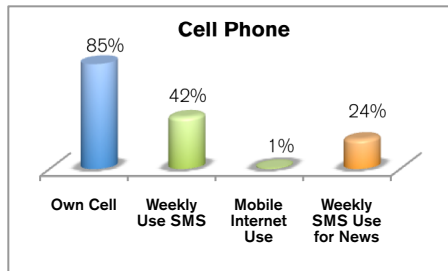
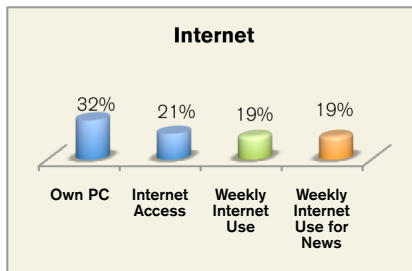
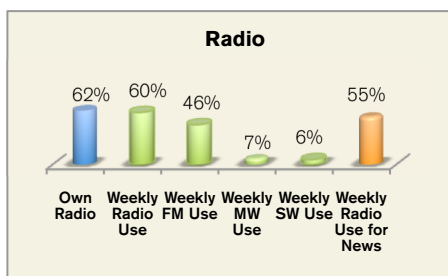
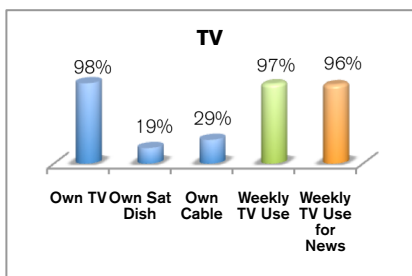
A U D I E N C E C O M P O S I T I O N

	Sample	VOA Weekly Aud.	RFE/RL Weekly Aud.
Sex	%	%	%
Male	45	45	53
Female	55	55	47
Age			
15-24	16	7	2
25-34	20	20	22
35-44	17	18	24
45-54	15	20	15
55-64	14	17	23
65+	19	17	13

	Sample	VOA Weekly Aud.	RFE/RL Weekly Aud.
Education	%	%	%
None	0	0	0
Primary	5	3	5
Secondary	46	41	40
Technical	29	31	26
Coll./Univ.	21	25	28
Ethnicity/Nationality			
Ukrainian	83	85	88
Russian	14	15	10
Other	2	0	0

	Sample	VOA Weekly Aud.	RFE/RL Weekly Aud.
Residence	%	%	%
Urban	67	70	57
Rural	33	30	43
Language			
Ukrainian	46	65	69
Russian	40	25	23
Ukrain./Russ.	12	10	6

M E D I A U S E



Top Ten Media Outlets

1. Inter
2. 1+1
3. ICTV
4. STB
5. Novyy Kanal
6. TRC Ukraine
7. UT-1
8. Kanal 5
9. ORT-1
10. Ukrainian Radio 1

Top Ten Sources of News

1. Inter
2. 1+1
3. ICTV
4. STB
5. ORT-1
6. Channel Ukraine
7. Novyy Kanal
8. Kanal 5
9. UT-1
10. Ukrainian Radio 1

New Media Index Rankings

Overall Rank	14/54
Wired Rank	15/54
Mobile Rank	15/54

Web Analytics

VOA Weekly Visitors	2,239
Weekly Visits	5,414
RFE/RL Weekly Visitors	40,621
Weekly Visits	72,011

C O N T E X T



Stability



Political Freedom



Press Freedom



Ease of Distribution



Competition

Political Situation

- **Freedom House Political Freedom Index: FREE in 2010**
- **Economist Intelligence Unit Instability: VERY HIGH RISK (7.6) in 2009/2010**
- Ukraine's president Viktor Yanukovich has reversed many of the previous administration's reforms and brings Ukraine closer to Russia's orbit. Although the president continues to support European integration, he is no longer seeking membership in NATO for the country.
- In the first 100 days of his presidency Yanukovich signed an agreement with Russia allowing the Russian Black Fleet a presence in Ukraine until 2042 (reportedly in exchange for the lower natural gas prices) and endorsed Russian denial of Holodomor as a genocide of the Ukrainian people committed by Stalin's regime.
- The members of his Cabinet are considering provisions regarding the Ukrainian language – such as elimination of the Ukrainian language exam for entering the universities and reversing the previous government's decision to translate foreign films into Ukrainian.

Media Environment

- **Freedom House Press Freedom Index: PARTLY FREE (108/196) in 2010**
- **Reporters Without Borders Index: 22.00 (89/175) in 2009**
- The media environment in Ukraine is degrading. Despite assertions by the Yanukovich administration that "everything is normal," there is growing evidence of inappropriate pressure and censorship.
- Two opposition-leaning channels, Channel 5 and TV1, have claimed that Valeriy Khoroshkovski, the new chairman of Ukraine's Security Service (SBU) and the owner of Inter TV channel, was behind a court ruling that deprived them of broadcasting licenses.
- There is a growing absence of critical opinion on TV and fewer oppositional leaders appear on the popular talk shows. Moreover, top managers of popular mass media outlets are being summoned to meetings where they receive oral instructions on how to present news.
- Ukrainian journalists –supported by Ukrainian media freedom groups – have launched a "Stop Censorship" campaign, protesting self-censorship by news editors of several TV channels and interference by foreign pundits, such as the Russian citizen Igor Shuvalev.
- Overall, radio ownership and use in the last five years have declined from 78 percent in 2005 to 62 percent in 2009. Its use as a source of news and information has decreased as well, from 70 percent in 2005 to 55 percent in 2009. On the other hand, access to Internet has more than tripled, from 6 percent in 2005 to 21 percent in 2009.



PROFILE



Language of Broadcast: Urdu

Content: 91 hrs. of original radio programming per week; 2.5 hrs. of original and 2.5 hrs. of repeat TV programming per week; Internet

Distribution: 2 affiliates (1 FM, 1 TV), 2 IBB SW frequencies

Radio: VOA's Radio *Aap ki Dunyaa* broadcasts through one affiliate, Pakistan Broadcasting Corporation (PBC), the government-owned radio service that offers VOA's programming on a network of 12 FM stations in 12 cities around Pakistan. The service also broadcasts programs on 2 IBB MW and 2 SW frequencies.

TV: VOA's news-magazine "Beyond the Headlines" (Khabron se Aage) is on one affiliate, GEO TV, Pakistan's premier cable and satellite TV news source. The VOA program regularly scores the highest ratings for its time slot.

Staff: 24

Budget: \$10,504,000

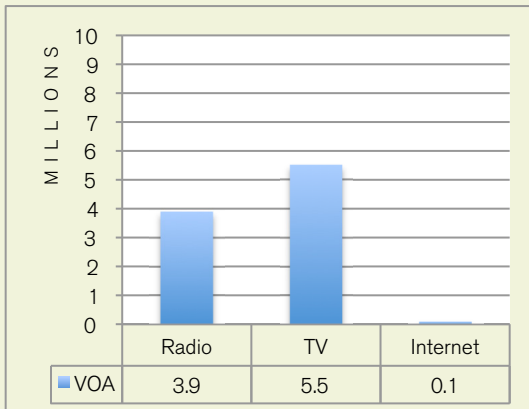
Established: 1951 to 1953; 1954 to present



PERFORMANCE DATA

(Using Data from Pakistan, August 2009)

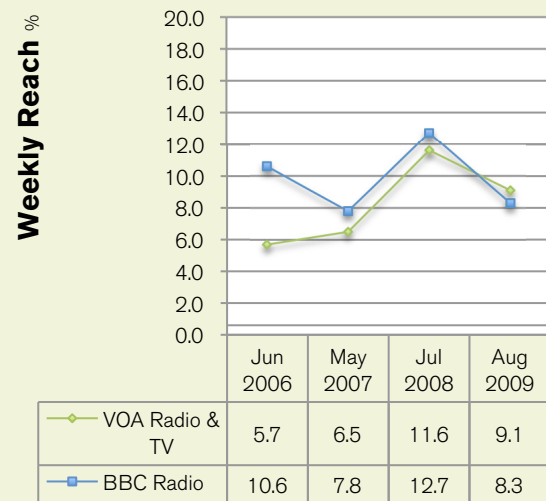
Audience Size



Weekly Reach by Media (%)

VOA	
Radio	4.0
TV	5.6
Internet	0.1
Total	9.1

Weekly Reach %



Awareness (%)

VOA	
	12

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

VOA	
Radio	83
TV	92

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

VOA Radio*	
Current Events in Pakistan	94
U.S. Culture	71
U.S. Policies	50

Quality

Combined Scores from audience panel

VOA	
Radio	3.3
TV	3.3

* Understanding ratings for VOA TV are 70% for Current Events, 80% for U.S. Culture and 71% for U.S. Policies.

Data are from an August, 2009 nationwide survey of adults (15+) in Pakistan. The survey excluded areas that are inaccessible due to the prevailing security situation or natural disaster: Federal Administrative Tribal Areas (FATA), Provincially Administered Tribal Areas (PATA), Northern Areas, Jammu & Kashmir. The survey is representative of 90% of the total adult population of Pakistan. Subsequent FATA data may be found on the Pashto page.

A U D I E N C E C O M P O S I T I O N

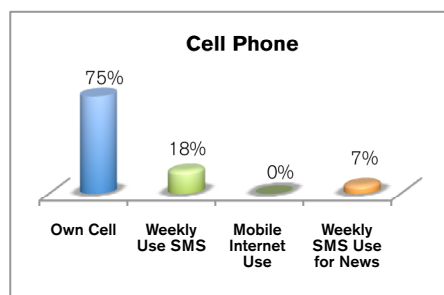
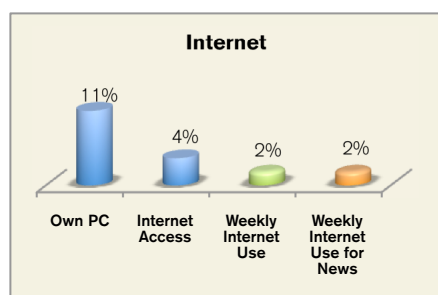
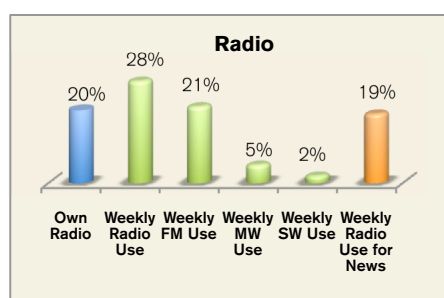
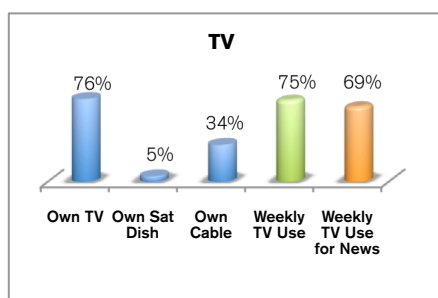
Total Population of Pakistan: 180.8 million

	Sample	VOA Weekly Audience
Sex	%	%
Male	49	74
Female	51	28
Age		
15-24	29	28
25-34	29	26
35-44	22	28
45-54	12	12
55-64	5	5
65+	3	1

	Sample	VOA Weekly Audience
Education	%	%
Illiterate/No Formal	36	14
Elem./Inter.	6	25
Secondary	50	41
Coll./Univ.	7	21
Ethnicity/Nationality		
na	na	na

	Sample	VOA Weekly Audience
Residence	%	%
Urban	35	48
Rural	65	52
Language		
Punjabi	40	23
Sariki	16	11
Urdu	13	22
Pashto	12	14
Sindi	11	18
Other	9	12

M E D I A U S E



Top Ten Media Outlets

1. PTV1
2. GEO News
3. Express News
4. PTV World/11
5. GEO TV
6. ATV
7. Aaj TV
8. PTV National
9. ARY Digital
10. ARY One World

Top Ten Sources of News

1. GEO News
2. PTV1
3. Express News
4. PTV World/11
5. Jang
6. ATV
7. KTN
8. Aaj TV
9. GEO TV
10. Kawish

New Media Index Rankings

Overall Rank	40/54
Wired Rank	34/54
Mobile Rank	43/54

Web Analytics

Weekly Visitors	7,659
Weekly Visits	18,574

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: PARTLY FREE in 2010**
- **Economist Intelligence Unit Instability: VERY HIGH RISK (7.8) in 2009/2010**
- Pakistan has had a functioning democracy since 2008 with the current government headed by Pakistan People's Party leader Yusuf Gilani.
- Pakistan faces some serious security challenges; it is currently waging a war against Taliban forces in the western region of the country bordering Afghanistan. This conflict has led to frequent terrorist attacks on both government and civilian targets across the country.
- Pakistan's relations with India are volatile due to unresolved conflict over Kashmir and inflamed by terrorist attacks on India originating from Pakistan.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (134/196) in 2010**
- **Reporters Without Borders Index: 37.33 (159/175) in 2009**
- Pakistan has a strong domestic media; it has seen considerable growth in independent TV and radio channels over the past 5 years. However private TV channels have been subject to government interference.
- State run TV is now outperformed by private news channels, a switch driven by greater access to cable & satellite TV, although this access is limited in rural areas.
- While private FM radio channels have mushroomed, they are not allowed to carry substantial news content.
- Internet is still limited to an urban elite. In May 2010, the government banned social media website Facebook for hosting a webpage deemed insulting to Islam.
- The press is diverse and free but readership mainly confined to urban areas.



PROFILE



Radio Free Asia



Language of Broadcast: Uyghur

Content: 7 hrs. of original and 7 hrs. of repeat radio programming per week; Internet

Distribution: 4-5 IBB SW frequencies; Satellite rebroadcasting

Staff: 14

Budget: \$1,615,000

Established: 1998 to present



PERFORMANCE DATA

Audience Size

MILLIONS

Political conditions in China's Xinjiang Uyghur Autonomous Region (XUAR) make it impossible to conduct quantitative research to measure RFA's Uyghur audience.

	Radio	Internet
RFA		

Weekly Reach by Media (%)

	RFA
Radio	na
TV	na
Internet	na
Total	na

Weekly Reach

%

Political conditions in China's Xinjiang Uyghur Autonomous Region (XUAR) make it impossible to conduct quantitative research to measure RFA's Uyghur audience.

RFA Radio

Awareness (%)

	RFA
	na

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)

	RFA
Radio	na
TV	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)

	RFA
Current Events	na
Current Events in Region	na
U.S. Policies	na

Quality

Combined Scores from audience panel

	RFA
Radio	3.0
TV	na

*China's Xinjiang Uyghur Autonomous Region (XUAR) has a total population of 20.1 million—7.9 million are Chinese; the rest belong to ethnic minority groups, of which 9 million are Uyghurs. (Source: Xinhua News, April 2006. Non-PRC sources suggest the Uyghur population may be much higher.)

**Demographic information is for China as a whole and are taken from a November, 2009 nationwide survey of adults (15+).

In-country quantitative research in the Xinjiang Uyghur Autonomous Region (XUAR) is impossible.

Uyghur Broadcasting

Total Population of Xinjiang: 20.1 million*

A U D I E N C E C O M P O S I T I O N **

	Sample**	RFA Weekly Aud.
Sex	%	%
Male	50	na
Female	50	na
Age		
15-24	17	na
25-34	21	na
35-44	25	na
45-54	22	na
55-64	12	na
65+	16	na

	Sample**	RFA Weekly Aud.
Education	%	%
Primary or less	22	na
Junior School	40	na
High School	26	na
Vocational	8	na
Coll./Univ.	3	na
Ethnicity/Nationality		
Han	99	na
Other	1	na

	Sample**	RFA Weekly Audience
Residence	%	%
Urban	45	na
Rural	55	na
Language		
Mandarin	14	na
Cantonese	1	na
Other	85	na

**Demographic information is for China as a whole and is taken from a November 2009 nationwide survey of adults (15+).

M E D I A U S E

TV Media use data is not available.	Radio Media use data is not available.	Internet Media use data is not available.	Cell Phone Media use data is not available.
---------------------------------------------------	------------------------------------------------------	---------------------------------------------------------	-----------------------------------------------------------

New Media Index Rankings

Overall Rank	na/54
Wired Rank	na/54
Mobile Rank	na/54

Web Analytics

Weekly Visitors	4,218
Weekly Visits	12,442

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index:**
NOT FREE in 2010 (China)
- **Economist Intelligence Unit Instability:**
MODERATE RISK (4.8) in 2009/2010 (China)
- The Xinjiang Uyghur Autonomous Region of China is far more restricted than the rest of China. Tensions between Uyghurs and the ruling Han majority are at an historic high after violent clashes broke out between Uyghurs and Han Chinese in Xinjiang in July of last year. Chinese authorities responded with a harsh crackdown on Uyghurs in the XUAR.
- Government surveillance of a wide range of activities in the XUAR is systematic and intense. Even the limited freedom of action enjoyed by residents in other areas of China is restricted in Xinjiang. Going beyond simple surveillance, the government literally shutdown text messaging and internet in Xinjiang following last July's ethnic clashes.
- As part of its Western development strategy, the Chinese government has put in place policies to encourage Han migration to the XUAR in an attempt to Sinify the region and further secure Beijing's control of Uyghur areas.
- The research environment in Xinjiang is extremely sensitive and although limited research is possible in Xinjiang, most Uyghur research is conducted outside of the XUAR in Turkey or Central Asia.

Media Environment

- **Freedom House Press Freedom Index:**
NOT FREE (181/196) in 2010 (China)
- **Reporters Without Borders Index:**
84.50 (168/175) in 2009 (China)
- Chinese authorities tightly restrict any content they deem to be sensitive and this is doubly true of Xinjiang. Media consumers in Xinjiang are limited largely to official Chinese media sources.
- Even under normal circumstances, US International broadcasters are among the most tightly censored media outlets in Xinjiang. RFA radio broadcasts are intensively jammed and international broadcasters' websites are blocked. Such restrictions present serious obstacles to those in China attempting to access US international broadcaster content.
- After the July 2009 ethnic clashes in the XUAR Chinese media restrictions in the Xinjiang reached a new high. The Internet service was suspended to the whole of the XUAR from July 2009 until May 2010 and even now Internet restrictions remain severe. Text messaging services were suspended from July 2009 until January 2010 and text message content continues to be monitored.
- Prior to July 2009 many relatively sophisticated young Uyghurs had begun to rely on the Internet and other forms of new media for Uyghur-language sources of news and information. Many Internet-savvy Uyghurs interviewed during qualitative research reported having used proxy servers or anti-censorship software to access sensitive or blocked content. As in the rest of China, blogs, podcasts, social networking sites and micro-blogs had become a normal part of many Uyghur Internet users' online routines. Among Uyghurs who have left the XUAR, such as those in Turkey, the Internet seems to be a primary source of Uyghur news.
- However, for many Uyghurs in rural XUAR, radio remains an important source for Uyghur language news. Radio broadcasts are also looked upon favorably because listeners are less susceptible to government monitoring than those accessing sensitive content online.

PROFILE



Voice of America®



Language of Broadcast: Uzbek

Content: 3.5 hrs. of original radio programming per week; 0.5 hrs. of original and 0.5 hrs. of repeat TV programming per week; Internet

Distribution: 2 affiliates (1FM, 1 TV); 4 IBB SW frequencies

TV: VOA's 30-minute weekly TV show *Exploring America* is carried by Keremet TV in Osh, Kyrgyzstan twice a week. The program is repeated on satellite every day of the week.

Radio: The daily 30-minute radio show is carried by Radio Almaz FM in Bishkek, Kyrgyzstan and broadcast via 4 IBB SW frequencies.

Staff: 4

Budget: \$721,000

Established: 1958; 1972 to present; TV service established in 2004



RadioFreeEurope
RadioLiberty



Language of Broadcast: Uzbek

Content: 20 hrs. of original and 32 hrs. of repeat radio programming per week; Internet

Distribution: 1 IBB MW and 3 SW frequencies, Satellite

RFE/RL's delivery includes multiple SW frequencies, 1 cross-border MW from Armenia, Yamal, HotBird, AsiaSat, and Internet with proxies and streaming audio (Uzbek site with Latin page).

Staff: 10

Budget: \$1,755,000

Established: 1953 to present



PERFORMANCE DATA

(Using Data from Uzbekistan, December 2009)

Audience Size

MILLIONS

Audience figures based on surveys conducted in politically repressive environments. Because individuals in these countries are discouraged or even prohibited by their governments from listening to U.S. international broadcasts, actual audience numbers may be higher than the ones cited here.

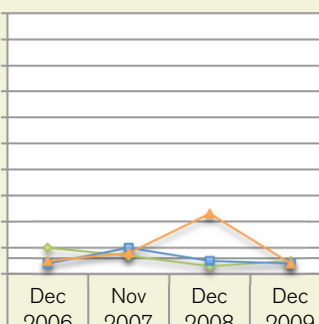
	Radio	TV	Internet
VOA	0.02	0.1	0.0
RFE/RL	0.1		0.0
USIB	0.1	0.1	0.0

Weekly Reach by Media (%)

	VOA	RFE/RL	USIB
Radio	0.1	0.4	0.5
TV	0.5	na	0.5
Internet	< .1	< .1	< .1
Total	0.5	0.4	0.9

Weekly Reach

10.0
9.0
8.0
7.0
6.0
5.0
4.0
3.0
2.0
1.0
0.0



Awareness (%)

	VOA	RFE/RL
	16	29

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)*

	VOA	RFE/RL
Radio	na	na
TV	na	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)*

	VOA Radio*	RFE/RL
Current Events	na	na
U.S. Culture (VOA) or Current Events in Uzbekistan (RFE/RL)	na	na
U.S. Policies	na	na

Quality

Combined Scores from audience panel

	VOA	RFE/RL
Radio	3.3	3.3
TV	3.5	na

*Samples of VOA and RFE/RL weekly listeners in the survey are too small for meaningful analysis.

Data are from a December 2009 nationwide survey of adults (15+) in Uzbekistan.

Uzbek Broadcasting

Total Population of Uzbekistan: 27.6 million

A U D I E N C E C O M P O S I T I O N

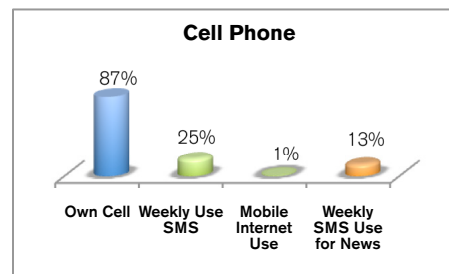
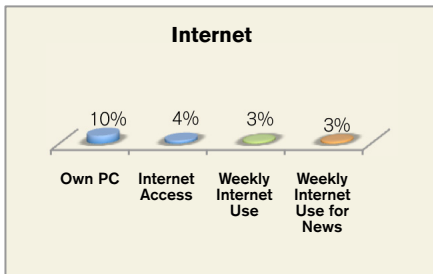
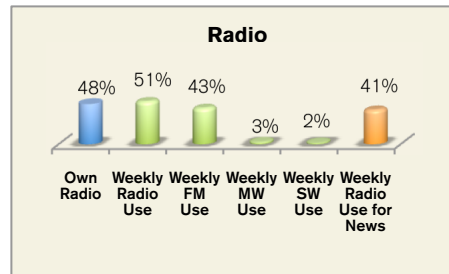
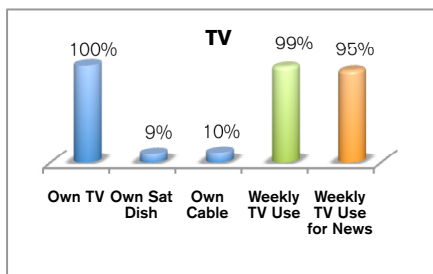
	Sample	VOA Weekly Aud.*	RFE/RL Weekly Aud.*
Sex	%	%	%
Male	46	na	na
Female	54	na	na
Age			
15-24	30	na	na
25-34	25	na	na
35-44	19	na	na
45-54	13	na	na
55-64	7	na	na
65+	6	na	na

	Sample	VOA Weekly Aud.*	RFE/RL Weekly Aud.*
Education	%	%	%
None	0	na	na
Primary	27	na	na
Secondary	34	na	na
Technical	25	na	na
Coll./Univ.	14	na	na
Ethnicity/Nationality			
Uzbek	84	na	na
Tajik	4	na	na
Other	12	na	na

	Sample	VOA Weekly Aud.*	RFE/RL Weekly Aud.*
Residence	%	%	%
Urban	36	na	na
Rural	64	na	na
Language			
Uzbek	82	na	na
Tajik	7	na	na
Russian	6	na	na
Other	6	na	na

*Samples of VOA and RFE/RL weekly listeners in the survey are too small for meaningful analysis.

M E D I A U S E



Top Ten Media Outlets

1. Yoshlar-TV
2. UZ TV 1 Uzbekistan
3. TV Sport-Tashkent
4. Markaz TV
5. ORT-1 Evraziya
6. NTV (Russia)
7. Rossiya (Russia)
8. Namanghan TV
9. Margilon TV
10. Tashkent TV

Top Ten Sources of News

1. Yoshlar TV
2. Uz TV 1
3. Darakchi
4. TV Sport (Tashkent)
5. ORT-1 Evraziya
6. Vodi Sadosy
7. Rossiya (Moscow)
8. NTV (Moscow)
9. UR-4 Yoshlar
10. UR-2 Mashal

New Media Index Rankings

Overall Rank	42/54
Wired Rank	38/54
Mobile Rank	45/54

Web Analytics

VOA Weekly Visitors	2,238
Weekly Visits	7,656
RFE/RL Weekly Visitors	12,608
Weekly Visits	71,717

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: NOT FREE in 2010**
- **Economist Intelligence Unit Instability: HIGH RISK (6.3) in 2009/2010**
- The political situation in Uzbekistan is dismal but stable. The country remains one of the most repressive in the region. Stability is maintained by draconian measures restricting citizens from voicing any opposition to authorities.
- Uzbekistan's president Islam Karimov started an unconstitutional third term in office in 2008. He and his clan continue to use their power to repress political opposition, freedom of speech, religion, and assembly. The country is also one of the most corrupt in the world -- ranked 174 out of 180 countries surveyed in Transparency International's 2009 Corruption Perceptions Index.
- As in the Soviet era, the government maintains a system of surveillance of its citizens. It has a widespread network of 'whistleblowers' in the mahallas (neighborhood communities) who report to authorities suspicious activities of citizens. The system is also used to carry out surveillance at mosques.
- President Karimov uses the recent ethnic violence in Kyrgyzstan as propaganda to demonstrate how political freedoms exercised in Kyrgyzstan can lead to instability and violence.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (189/196) in 2010**
- **Reporters Without Borders Index: 54.25 (149/175) in 2009**
- The government heavily censors all media. There are no independent radio or TV stations in Uzbekistan; topics such as politics and religion are taboo. A recent example that illustrates how media is controlled is the way Uzbek media waited two days before reporting on in the mid-June 2010 ethnic violence in Osh. For several days Uzbek media waited for the instructions from the government on how to cover the events.
- Internet serves as a source for alternative information, but its reach has not grown measurably in the last five years; only 3 percent of the population uses Internet weekly. The government continues to impede access to alternative websites by blocking access and monitoring Internet cafés.
- The current regime has closed off all possibilities for international broadcasters to rebroadcast programming on local radio or TV, and those platforms available to international broadcasters (SW, MW, satellite, internet) reach only a small percentage of the Uzbek population.

PROFILE



Language of Broadcast: Vietnamese

Content: 17.5 hrs. of original radio programming per week; Internet

Distribution: 2 IBB MW and 2-3 SW frequencies
VOA Vietnamese broadcasts 3 daily radio programs for a total of 2.5 hours each day. The Service also has a multimedia website with audio, video, photos and blogs, as well as a mobile website; also on 4 social media sites: Facebook, Twitter, Yahoo 360 and YouTube.

Staff: 14

Budget: \$1,961,000

Established: 1943 to 1946; 1951 to present



Language of Broadcast: Vietnamese

Content: 14 hrs. of original radio programming per week; Satellite rebroadcasting; Internet

Distribution: 2 IBB MW and 4-6 SW frequencies

Staff: 19

Budget: \$2,504,000

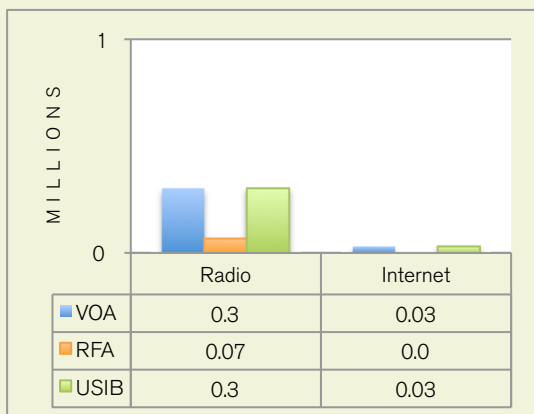
Established: 1997 to present



Audience figures are based on surveys conducted in politically repressive environments that are generally hostile to international broadcasting. Because individuals are discouraged or even prohibited by their government from listening to U.S. international broadcasts, actual audience numbers may be higher than the ones cited here.

PERFORMANCE DATA (Using Data from Vietnam, April 2009)

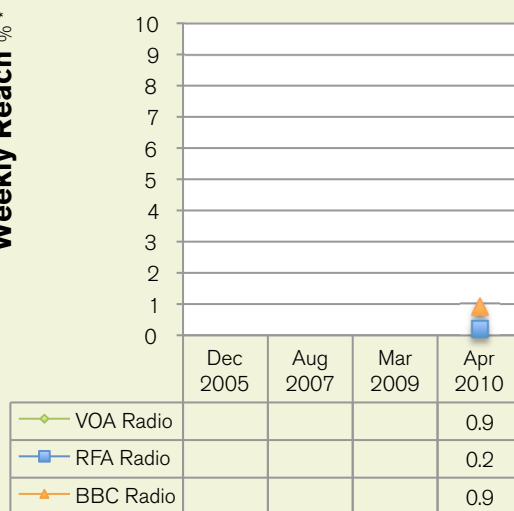
Audience Size



Weekly Reach by Media (%)

	VOA	RFA	USIB
Radio	0.9	0.2	1.0
TV	na	na	na
Internet	0.1	< .1	0.1
Total	0.9	0.2	1.0

Weekly Reach %



Awareness (%)

VOA	RFA
na	na

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)**

	VOA	RFA
Radio	na	na
TV	na	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)**

	VOA	RFA
Current Events	na	na
U.S. Culture (VOA) or Events in Vietnam (RFA)	na	na
U.S. Policies	na	na

Quality

Combined Scores from audience panel

	VOA	RFA
Radio	3.4	3.0
TV	na	na

*Due to differences in the sample areas and in weighting among recent surveys, trend data are not available.

**Samples of VOA and RFA weekly listeners in the survey are too small for meaningful analysis.

Data are from an April 2010 survey of adults (15-64) in 8 regions with the 30 most important urban centers of Vietnam; sample includes coverage of rural areas in these regions.

Vietnamese Broadcasting

Total Population of Vietnam: 87.3 million

A U D I E N C E C O M P O S I T I O N

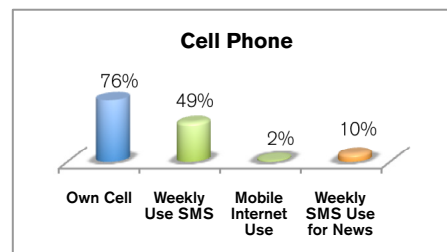
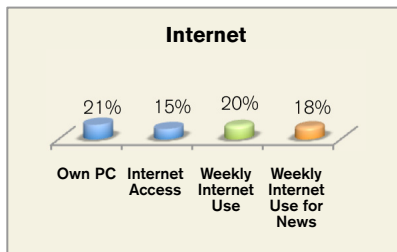
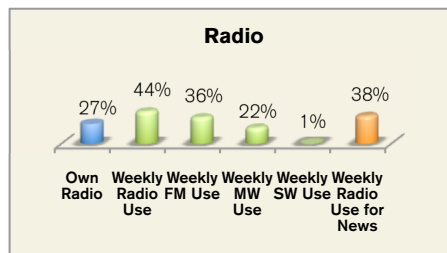
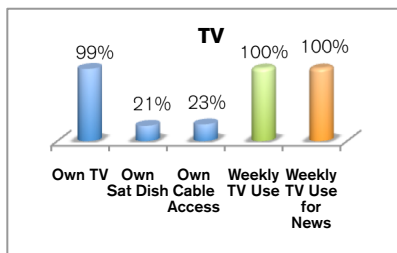
	Sam.	VOA Weekly Aud.**	RFA Weekly Aud.**
Sex	%	%	%
Male	50	na	na
Female	50	na	na
Age			
15-24	23	na	na
25-34	28	na	na
35-44	24	na	na
45-54	17	na	na
55-64	9	na	na
65+	na	na	na

	Sam.	VOA Weekly Aud.**	RFA Weekly Aud.**
Education	%	%	%
No formal	1	na	na
Primary	10	na	na
Secondary	75	na	na
Vocational	5		
Coll./Univ.	10	na	na
Ethnicity/Nationality			
na		na	na

	Sam.	VOA Weekly Aud.**	RFA Weekly Aud.**
Residence	%	%	%
Urban	31	na	na
Rural	69	na	na
Language			
Vietnamese	na	na	na
Chinese	na	na	na

**Samples of VOA and RFA weekly listeners in the survey are too small for meaningful analysis.

M E D I A U S E



Top Ten Media Outlets

1. VTV
2. Provincial TV stations
3. Provincial radio stations
4. VOV
5. Vietnam Cable TV
6. HCM Cable TV
7. Other domestic radio
8. SCTVC
9. Hanoi Cable TV
10. MTV

Web Analytics

VOA Weekly Visitors	75,831
Weekly Visits	283,562
RFA Weekly Visitors	95,039
Weekly Visits	272,234

New Media Index Rankings

Overall Rank	30/54
Wired Rank	28/54
Mobile Rank	32/54

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index: NOT FREE in 2010**
- **Economist Intelligence Unit Instability: MODERATE RISK (4.3) in 2009/2010**
- Vietnam is a one-party Communist state, and one of the fastest-growing economies in the world with GDP growing to 6.5 in 2010 from 5.3 percent in 2009. The reform policies started in the 1980's (commonly known as doi moi) led to a profound economic transformation after decades of violent conflicts. In the past decade, the country has reduced the rate of poverty by half, according to the World Bank.
- The next Party Congress is in January 2011. As a result, there is significant movement within the Party for new leadership positions. Most importantly, the government is increasingly nervous about detecting and controlling any sign of political dissent. In the past 12 months, multiple people have been arrested and sent to jail for promoting multiparty democracy.
- The Party's success in promoting economic growth, even during the global financial crisis, has enabled the party to keep its long-standing claim that it can continue to govern unchallenged. However, its legitimacy is being questioned, particularly via Internet and in relation to corruption, environmental degradation and strongly felt grievances as a result of land seizures.
- The political situation in Vietnam is quite complex. The government will continue showing relative signs of political openness by promoting greater grassroots participation at the district and commune levels. However, the old Party guard is also fearful that increasing social freedom may threaten the political status quo. This is most clearly visible in the area of media freedom.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (177/196) in 2010**
- **Reporters Without Borders Index: 81.67 (166/175) in 2009**
- According to the latest report of the Economist Intelligence Unit, published in June 2010, "the political scene remains dominated by efforts by the ruling Communist Party of Vietnam (CPV) to police the Internet. From embracing the Internet as a means of communicating policy [...] the authorities have grown increasingly suspicious of the way in which it can help political dissidents to organize and also act as an outlet for criticisms of the government and its policies". The government has invested a lot of resources to expand Internet access throughout the country. However, as the Party Congress scheduled for early 2011 approaches, the government has stepped up efforts to control new media.
- There is no independent, privately run media in Vietnam. Virtually all media outlets are under direct government control; criticism of the Communist Party is forbidden. The Ministry of Culture and Information is in charge of managing and supervising all publication and broadcasting activities, hence their very low ranking in indices of press and political freedoms.
- In late 2009, the government blocked Facebook for political reasons. In May 2010, Vietnam unveiled a fresh effort to divert people away from Facebook and other social networking websites with the launch of www.goonline.vn, its own, state-controlled version. Facebook continues to be popular and to fuel proxy server use.
- Vietnam has one of the fastest-growing mobile phone markets in the region. In May 2010, the Ministry of Information and Communication announced that, in May 2010, total telephone subscribers (fixed and mobile) had reached 80 million for a combined penetration rate of 90%. However, the role of mobile phones in news-seeking behavior is still limited and mostly focused on wealthy urbanites.

PROFILE



Language of Broadcast: English, Ndebele & Shona

Content: 12 hrs. of original radio programming ("Studio 7") per week; Internet

Distribution: 2 IBB FM, 1 MW and 2 or 3 IBB SW frequencies

Radio: Though the government of Zimbabwe started jamming the Zimbabwe Service's 909 AM signal in mid-2006, such interference has tapered off to a level best described as intermittent. The service's 3 SW frequencies cover the entire country of Zimbabwe, including the 20 percent of the national territory not reached by the Zimbabwe Broadcasting Corporation.

Web: Service also has a website and periodically uses SMS as another distribution channel.

Staff: 2

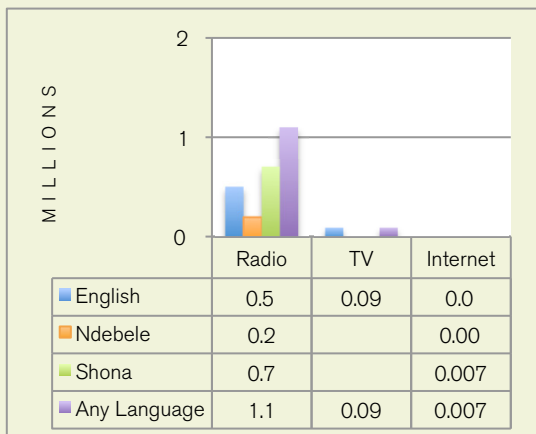
Budget: \$1,735,000

Established: 2003 to present



PERFORMANCE DATA (Using Data from Zimbabwe, June 2010)

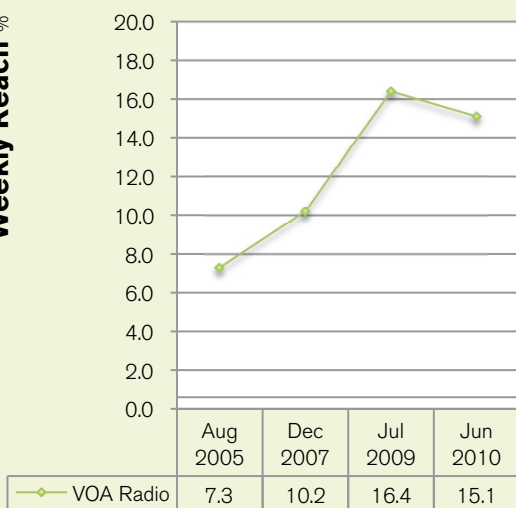
Audience Size



Weekly Reach by Media (%)

	English	Ndebele	Shona	Any Language
Radio	6.9	2.8	9.7	15.1
TV	1.2	na	na	1.2
Internet	< .1	< .1	0.1	0.1
Total	7.5	2.8	9.8	15.5

Weekly Reach %



Awareness (%)

VOA
40

Credibility

Percentage of surveyed weekly audience that found broadcasts credible (%)*

	VOA
Radio	95
TV	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)*

	VOA Radio
Current Events	96
U.S. Culture	72
U.S. Policies	56

Quality

Combined Scores from audience panel

	VOA
Radio	3.8
TV	na

*Credibility/understanding ratings and demographic profile information are for the VOA Zimbabwe Project in any language.

Data are from a June 2010 nationwide survey of adults (15+) in Zimbabwe.

Zimbabwe Broadcasting

Total Population of Zimbabwe: 12.5 million

A U D I E N C E C O M P O S I T I O N

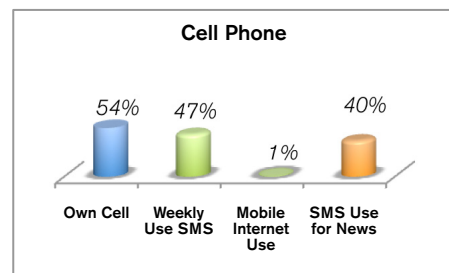
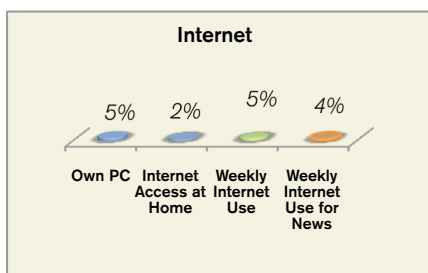
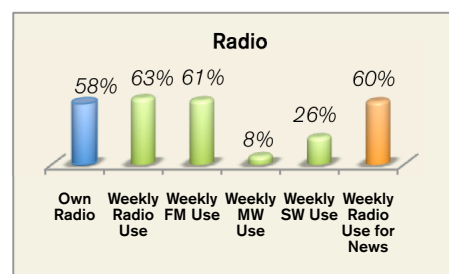
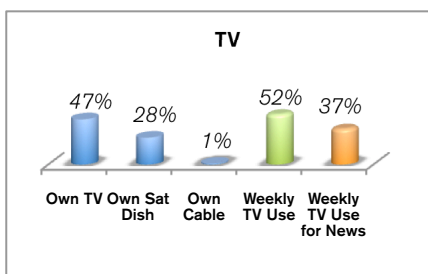
	Sample	VOA Weekly Audience*
Sex	%	%
Male	45	57
Female	55	43
Age		
15-24	32	28
25-34	26	33
35-44	14	20
45-54	11	7
55-64	9	9
65+	9	3

	Sample	VOA Weekly Audience*
Education	%	%
None	9	2
Primary	27	13
Sec./High School	60	75
Higher	4	10
Ethnicity/Nationality		
Shona	81	86
Ndebele	14	10
Other	5	4

	Sample	VOA Weekly Audience*
Residence	%	%
Urban	33	32
Rural	67	68
Language Spoken At Home		
Shona	82	87
Ndebele	14	10
English	2	3
Other	3	1

*Credibility/understanding ratings and demographic profile information are for the VOA Zimbabwe Project in any language.

M E D I A U S E



Top Ten Media Outlets

1. Radio Zimbabwe
2. ZTV1
3. SABC
4. Power FM
5. ETV
6. Botswana TV
7. VOA/Studio 7
8. National FM
9. Sky News
10. Spot FM

Top Ten Sources of News

1. Radio Zimbabwe
2. ZTV1
3. SABC
4. Power FM
5. Herald
6. VOA/Studio 7
7. National FM
8. Chronicle Bulawayo
9. Spot FM
10. Kwayedza

New Media Index Rankings

Overall Rank	42/54
Wired Rank	44/54
Mobile Rank	36/54

Web Analytics

Weekly Visitors	5,651
Weekly Visits	11,784

C O N T E X T



Stability



Political Freedom



Press Freedom



Ease of Distribution



Competition

Political Situation

- **Freedom House Political Freedom Index: NOT FREE**
- **Economist Intelligence Unit Instability: VERY HIGH RISK (8.8) in 2009**
- A long-awaited and hard-fought power-sharing agreement went into effect in February 2009, between President Robert Mugabe's Zanu-PF party and the main opposition MDC, led by Prime Minister Morgan Tsvangirai. Although the MDC gained the right to lead a number of ministries, the strength of Mugabe's rule remains fundamentally unchanged.
- In October 2010, Prime Minister Tsvangirai announced his rejection of Mugabe's ministerial appointments and perceived breaching of the power-sharing agreement.
- Zimbabwe's economic outlook has improved somewhat, since dollarization halted the runaway inflation that devastated the economy in recent years. However, widespread poverty and unemployment remain the norm for average Zimbabweans.

Media Environment

- **Freedom House Press Freedom Index: NOT FREE (181/196) in 2010**
- **Reporters Without Borders Index: 46.50 (136/175) in 2009**
- Strict government control of the media continues, but there are some signs of liberalization. A new private newspaper was granted a license to print in May 2010—the first in seven years—and the newly formed Zimbabwe Media Commission theoretically has a mandate for reforming the media sector.
- With wide availability of cheap reception hardware, free-to-air satellite programming from South Africa via SABC, and constrictions on the local media scene, ownership of satellite dishes and viewing of foreign TV programming has risen substantially.
- Local journalists are subject to intimidation and imprisonment, and foreign journalists are regularly denied credentials or harassed in other ways. Strict media laws have been used to restrict the activities of private media outlets and journalists.
- Despite the controls on domestic media, a number of international stations broadcast into the country via shortwave radio, including not only VOA, BBC, and Deutsche Welle but also two stations run by expatriate Zimbabweans, Voice of the People and SW Radio Africa. The government has periodically jammed these shortwave broadcasts.
- Media access and use are very sensitive issues in Zimbabwe, and interviewers must secure permission to conduct interviews from the local authorities in each area they visit. Any study mentioning international broadcasters is met with suspicion by authorities loyal to the ruling Zanu-PF party, and at times local authorities will deny permission to researchers.

